

Professional Communications

PROFESSIONAL COMMUNICATIONS

A Common Approach to Work-place Writing

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About this Textbook



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If sections of this resource appear to contain several styles of writing and/or voice, then that's intentional! As a compilation, we have attempted to gather sources that not only reflect and reinforce the core teaching and learning methodologies we use in our professional communications curriculum, but also to mirror the often collaborative nature of professional communication itself.

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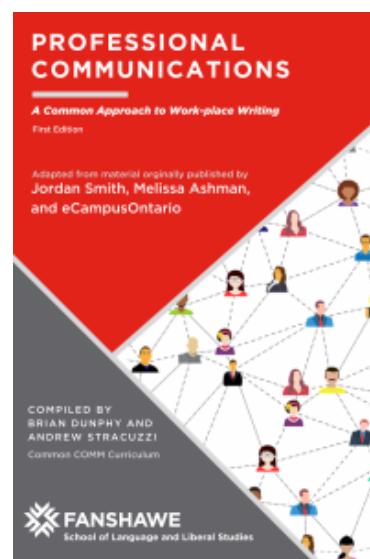
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INTRODUCTION TO THE TEXT

Brian Dunphy and Andrew Stracuzzi

Professional Communications: A Common Approach to Work-place Writing

Welcome to your new communications textbook! Now, you may be feeling like English classes should be behind you since you graduated from high school, but don't worry. This is different. At Fanshawe College, if you have taken the Reason and Writing curriculum (or "WRIT"), then you'll already be familiar with the importance we place on making sure students are equipped with the essential principles of reading, writing, and reasoning at the post secondary level. Just as WRIT is designed to help students succeed in becoming functional, competent communicators in college, Communications (or "COMM") courses are designed to prepare you for the real, everyday tasks of writing and speaking in your chosen profession. Ask any professional in your field, and they'll set you straight on the enormous importance of practical communication in the work they do.



So How Does College Writing Differ from Workplace Writing?

The kind of writing you do and the communication skills you use in college are designed to help you achieve a specific purpose: to earn your academic credentials. Workplace writing, however, is specific to the needs of your job. One of the major differences between workplace writing and college writing is reflected in the expectations of those who assign the writing. In the workplace, the emphasis is on producing a written product. In college writing, the emphasis is on writing to think, writing to learn, and writing to demonstrate learning. For example, at work, you may be expected to write an email to employees to explain a procedural change. In a college assignment, you may be expected to understand the process of creating an email, to clearly explain a new policy, and to demonstrate reader-centered writing techniques in writing the email (Guffey, 2010).

At other times, the content, form, and style of your writing will follow company expectations and/or industry-standard conventions, and the process of writing may already be established for you. Using existing document templates and formats, as well as specific work-related language and tone may also be required. In short, work-place writing requires you to be adaptable and apply the skills you've acquired in college and tailor your writing for a number of situations and audiences. As a writer, you may be expected to occupy multiples

roles, such as information gatherer, researcher, presenter and, in some instances, you may need to write a document as part of a team.

Another way academic writing can differ from workplace writing is in the level of original ideas that are explored as well as the way personal opinion, individual preference, and unique expression of thought takes shape. Academic writing shows knowledge and understanding of both content and process. On the other hand, workplace writing often aims to convey information clearly and concisely about a specific issue at hand. The channel of communication is often already determined in its purpose and form, whether it be internally via an email to colleagues or externally in a press release for business clientele. Workplace writing tends to be practical—geared toward completing a work-related task—whereas college writing enables you to explore new avenues of thought.

Keep in mind that writing is also only *one* form of communication; it's one of the primary ways we communicate in school, but it's also important to think about the value of communication, in general, and specifically how your ability to communicate will differ in personal and professional settings.

As we continue to evolve in an ever changing digital landscape, communication technology within the workplace (and in school), is changing, so it is also important for you to understand how communication must be altered in these new media settings. Social media, web-based writing, teleconferencing, cloud-based collaboration, and visual and graphic-based communication are common place today and will impact the way you write and communicate in a globally-connected always-on world.

This should be something you think about as you go through your Communications course. You may not fully appreciate it yet, but this open text is compiled to help develop those vital communication skills now and in the years ahead as you grow professionally.

Common Communications Course Learning Outcomes

This open textbook is designed to support the learning outcomes of Fanshawe College's first-year Common Communications curriculum. If you are taking this course, it means that your program requires an advanced professional communication credit as part of your diploma. In fact, because almost all diploma programs at Fanshawe have a communications component, you can be sure that your class will be similar in content, structure, and approach; in short, all students will have a common or shared experience regardless of their program.

Although each school offer a variation of COMM and assigns a different course code, they're all consistent in their approach to professional communication studies. At Fanshawe, the following schools are part of the common communications curriculum:

- School of Community Studies (COMM 3082)
- School of Contemporary Media (COMM 3075)
- School of Design (COMM 3074)

- School of Digital and Performing Arts (COMM 3075)
- School of Information Technology (COMM 3077)
- School of Language and Liberal Studies (COMM 3073)
- School of Public Safety (COMM 3048)
- School of Tourism, Hospitality and Culinary Arts (COMM 3080)

Because all common COMM courses are equivalent credits, the courses listed above also share similar course learning outcomes, which are sometimes referred to as CLOs and appear on your course outline. CLOs provide you with a set of measurable goals to achieve success in your COMM course. As such, this textbook refers to the following common learning outcomes, and they appear at the beginning of each chapter and section:

1. **Compose** workplace documents including emails, letters, and a research report;
2. **Analyze** an audience and tailor a message to that audience (objective/subjective writing, persuasive writing, internal/external audience);
3. **Apply** principles of grammar, punctuation, and editing appropriate to professional writing;
4. **Prepare** documents according to basic principles of formatting and visual communication in various written documents;
5. **Demonstrate** critical thinking skills in reading, writing, and discussion;
6. **Perform** an effective presentation; and
7. **Employ** research skills including locating, selecting, evaluating, and documenting source materials.

In addition, the Lawrence Kinlin School of Business's COMM 3020, which is a part of our common curriculum, contains the following learning outcomes:

1. **Communicate** clearly, concisely and correctly in the written, spoken and visual form that fulfills the purpose and meets the needs of the audience;
2. **Respond** to written, spoken or visual messages in a manner that ensures effective communication;
3. **Create** well-organized business documents (including emails, letters and reports);
4. **Compose** stylistically appropriate business documents;
5. **Evaluate** business case studies;
6. **Deliver** a persuasive presentation on a business-related topic;
7. **Synthesize** research sources in an APA-style, analytic report;
8. **Create** a resume and cover letter for use in employment searches;
9. **Explain** cultural differences and the impact these differences have on effective business communication, and
10. **Implement** principles of properly documenting the use of research sources and others' ideas.

The above outcomes may not represent every aspect you'll learn in your course or they may be expressed using slightly different wording on some course outlines (depending on the school and program you're in), but they nonetheless represent a common set of shared skills and tasks.

What You Need to Succeed

This resource is suited best to students who use:

- Microsoft Word (MS Word) as their word processor program, which is available to most Fanshawe College students via the Fanshawe Connected website or contact IT Services for additional assistance.
- The Google Chrome browser for internet activity
- A laptop or desktop computer with the Windows operating system, though some considerations are made for Mac users.

A Note on Style

Whereas most commercial textbooks on communications maintain a high level of formality, this open textbook relaxes that a little to include contractions, colourful expressions, liberal use of “they” (rather than “he or she”) as a singular pronoun, and other characteristics of semi-formal or casual business writing. The idea is to model the style of a common email between work colleagues, which imitates a conversational style of writing while still being grammatically correct. Notice in the previous sentence and section, for instance, that “email” and “internet” appear instead of the more formal, old-fashioned “e-mail” and “Internet” often used in other textbooks. For this we take our cue from style guides in leading tech publications and international news organizations that trend towards lowercasing and de-branding the terms (Martin, 2016). See §4.5.1.2 on the formality spectrum in professional writing for more on the editorial decision to model a casual style for accessibility reasons.

Organization

This textbook is divided into five major units designed to guide first-year college students who have a high school education and perhaps some employment experience through the steps towards proficiency in English communication for college and professional success.

Unit 1: Communication Foundations

Unit 2: The Writing Process

Unit 3: Workplace Communication

Unit 4: Employment and Interpersonal Communication

Unit 5: Presentations and Group Communication

From the above units, you can further explore the full range of topics in the textbook's chapters, sections, and subsections.

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PART I

UNIT 1: COMMUNICATION FOUNDATIONS



Common COMM Course Learning

Outcomes

This unit supports the following course learning outcomes (*COMM 3048, COMM 3073, COMM 3074, COMM 3075, COMM 3077, COMM 3080, COMM 3082*):

- **5. Demonstrate** critical thinking skills in reading, writing, and discussion.

COMM 3020:

- **1. Communicate** clearly, concisely and correctly in the written, spoken and visual form that fulfills the purpose and meets the needs of the audience.

CHAPTER 1: PROFESSIONAL COMMUNICATIONS

Jordan Smith

Chapter Learning Objectives

1. Distinguish between the nature of English and Communications courses.
2. Explain the importance of studying Communications.
3. Identify communication-related skills and personal qualities favoured by employers.
4. Consider how communication skills will ensure your future professional success.
5. Recognize that the quality of your communication represents the quality of your company.
6. Distinguish between personal and professional uses of communications technology in ways that ensure career success and personal health.
7. Select and use common, basic information technology tools to support communication.
8. Illustrate the communication process to explain the end goal of communication.
9. Troubleshoot communication errors by breaking down the communication process into its component parts.
10. Reframe information gained from spoken messages in ways that show accurate analysis and comprehension.

Why Communications?

Let's begin by answering the question that is probably on the mind of anyone enrolled in an introductory English Communications course. Why are you here? It's probably not because you chose this course out of your natural enthusiasm for English classes. It's because it is a requirement to advance in the program and graduate.

So why would the program administrators require you to take this course? Is it just a money grab? The short answer to the second question is: No. The answer to the first question is: because you need sharp

communication skills to be able to apply the core skills you're learning in your other courses in the program. This textbook's first section expands on that answer in more detail so that you can proceed through this course in the right frame of mind. None of your course's lessons make sense unless you realize that communications skills are not merely nice-to-have assets in your program and in life; they are absolutely necessary to your survivability in this social world and tough economy.

- 1.1.1: Communications vs. English Courses
- 1.1.2: Communication Skills Desired by Employers
- 1.1.3: A Diverse Skillset Featuring Communications is Key to Survival
- 1.1.4: Communication Represents You and Your Employer

1.1 COMMUNICATIONS VS. ENGLISH COURSES

1.1.1: Communications vs. English Courses

LEARNING OBJECTIVES



1. Distinguish between the nature of English and Communications courses
2. Explain the importance of studying Communications

Whether students enter their first-year college Communications courses right out of high school or with years of work experience behind them, they often fear being doomed to repeat their high school English class, reading Shakespeare and writing essays. Welcome relief comes when they discover that a course in Communications has nothing to do with either of those things. Why should it when no one in the modern workplace speaks in a Shakespearean dialect or writes expository essays? If not High School English 2.0, what is Communications all about, then?

For our purposes, Communications (yes, with a capital *C* and ending with an *s*) is essentially the practice of interacting with others in the workplace and other professional contexts. Absolutely every job—from A to Z, accountant to Zamboni mechanic—involves dealing with a variety of people all day long. You may deal with clients, managers, coworkers, stakeholders (people and organizations yours deals with, such as suppliers), professional organizations, a union perhaps, investors, the public, media, students, and so on depending on the nature of the job.

When dealing with each of those audiences, we adjust the way we communicate according to well-known conventions. You wouldn't talk to a customer or client the same way you would a long-time friendly co-worker; depending on what kind of relationship you have with your manager, you probably wouldn't speak or write to them in the same way you would either of the others. Learning those communication conventions is certainly easier and more useful than learning how to interpret a four-hundred-year-old play. If we communicate effectively—that is, clearly, concisely, coherently, correctly, and convincingly—by following those conventions, we can do a better job of applying our core technical skills, whether they be in sales, the skilled trades, the service industry, health care, office management, the government, the arts, and so on.

A course in Communications brings your existing communication skills up to a professional level by focusing on how to follow conventions for interacting with those various audiences in a variety of channels—whether they be speaking in person, by phone, email, text, or emojis, for instance. That we don’t generally communicate by emojis with clients or managers (unless they tell us that they prefer it), for instance, is a convention that doesn’t occur naturally to some. Indeed, it may come as a surprise to some that you’d risk embarrassing yourself and permanently undermining your credibility if you added emojis to a message sent to a manager or client. Because we are not born with an instinct for staying within the bounds of respectable communication, the channel conventions must be learned and practiced.

Some will approach this course with years of professional experience behind them and will appreciate that the communication aspect of any job is easy to underestimate. They will also appreciate that *not* abiding by those well-established communication conventions—by going rogue and freestyling the way you communicate—usually brings embarrassment and failure. To the audiences you deal with in the workplace, how well you communicate determines your level of professionalism. It’s like your style of dress: a well-written email has the same effect as a nice suit worn in an office or a clean uniform worn by a service worker—it suggests detail-oriented competence. Major writing errors are like big stains down the front of that suit or revealing rips in that uniform—they make you look sloppy, foolish, and unreliable. Just as we spent decades getting to where we are now as communicators in whatever situation we find ourselves, we need a college course to iron out the wrinkles of our communication skills for the better workplaces we aspire to—what we go to a vocational college for—in ways that our previous work experience and high school English classes didn’t.

This isn’t to say that your high school English classes were useless, though few can claim that they prepared you adequately for the modern workplace. Arguably the movement away from English fundamentals (grammar, punctuation, spelling, style, mechanics, etc.) in Canadian high schools does a disservice to students when they get into their careers. There they soon realize that stakeholders—customers, managers, co-workers, etc.—tend to judge the quality of a person’s general competence by the quality of their writing (if that’s all they have to go on) and speaking. The topic of Communications, then, includes aspects of the traditional English class curriculum, at least in terms of the basics of English writing. But the emphasis always returns to what is practical and necessary for succeeding in the modern workplace—wherever that is—not simply what is “good for you” in the abstract just because someone says it is.

If you feel that you are a weak writer but an excellent speaker or vice versa, rest assured that weaknesses and strengths in different areas of the communication spectrum don’t necessarily mean that you will always be good or bad at communication in general. Weaknesses can and should be improved upon, strengths built upon. It’s important to recognize that we have more communication channels available to us than ever before, which means that the communication spectrum—from oral to written to nonverbal channels—is broader than ever. Competence across that spectrum is no longer just a “nice to have” asset sought by employers, but essential to career success.

KEY TAKEAWAY

By teaching you the communications conventions for dealing with a variety of stakeholders, a course in Communications has different goals from your high school English course and is a vitally important step towards professionalizing you for entry or re-entry into the workforce.

EXERCISE

List your communication strengths and weaknesses. Next, explain what you hope to get out of this Communications course now that you know a little more about what it involves. Before you answer, however, read ahead through the rest of this chapter to get a further sense of why this course is so vital to your career success.

1.1.2: Communication Skills Desired by Employers

Learning Objectives

3. Identify communication-related skills and personal qualities favoured by employers

If there's a shorthand reason for why you need communication skills to complement your technical skills, it's that you don't get paid without them. You need communication and “soft” skills to get work and keep working so that people continue to want to employ you to apply your core technical skills. A diverse skill set that includes communication is really the key to survival in the modern workforce, and hiring trends bear this out.

In its Employability Skills 2000+, the Conference Board of Canada lists “the skills you need to enter, stay in, and progress” in the 21st century workplace. The first category listed is communication skills, specifically how to:

- Read and understand information presented in a variety of forms (e.g., words, graphs, charts, diagrams)
- Write and speak so others pay attention and understand
- Listen and ask questions to understand and appreciate the points of view of others
- Share information using a range of information and communications technologies (e.g., voice, e-mail, computers)
- Use relevant scientific, technological, and mathematical knowledge and skills to explain or clarify ideas (Conference Board, n.d.a)

Likewise, the non-profit National Association of Colleges and Employers in the US surveys hundreds of employers annually and has found that, in the last several years, they consistently rank the following four skills as most desirable ahead of fifth-ranked technical skills:

1. Critical thinking and problem solving
2. Professionalism and work ethic
3. Teamwork
4. Oral and written communication (NACE, 2016)

When employers include these interrelated soft skills in job postings, it's not because they copied everyone else's job posting, but because they really want to hire people with those skills. From experience, they know that such skills directly contribute to the success of any operation no matter whether you're in the public or private sector because they help attract and retain customers and client organizations.

Traditional hiring practices filter out applicants who have poor communication skills, starting with a "written exam"—the résumé and cover letter. As documents that represent you in your physical absence, these indicate whether you are detail oriented in how you organize information and whether you can compose proper, grammatically correct sentences and paragraphs. If you pass that test, you are invited to the "oral exam," where your face-to-face conversational skills are assessed. If you prove that you have strong soft skills in this two-stage filter, especially if you come off as friendly, happy, and easy to work with in the interview, an employer will be more likely to hire you, keep you, and trust you with co-workers and clients.

The latest thinking in human resources (HR), however, is that both of those traditional filters are unreliable. Applicants can fake them. Expensive as it might be, you could get someone else to write your résumé and cover letter for you, or you can just follow a template and replace someone else's details with your own. Though most job competitions for well-paying jobs will yield exceptionally good and bad résumés and cover letters amidst a tall stack of applications, most tend to look the same because most applicants follow fairly consistent advice about how to put them together. Likewise, you can train for an interview and "fake it to make it" (Cuddy, 2012), then go back to being your less hireable self in the workplace, only to be the first one "let go" when the next office "reorganization" comes down.

Recruiters at the most successful companies such as tech giant Google have looked at the big data on hiring

and found that traditional criteria, including GPA and technical-skills test scores in the interview process, are poor predictors of how well a hire will perform and advance. New hires with only core technical skills, even if exceptionally advanced, don't necessarily become successful employees; in fact, they are the most replaceable in any organization, especially in STEM (science, technology, engineering, and math) industries (Sena & Zimm, 2017). According to *Business Insider*, Google's recruiters took an analytics approach like that portrayed in the 2011 film *Moneyball* and found that key predictors of success are instead personal traits, especially:

- **Adaptability:** the curiosity-driven agility to solve problems through independent, on-the-job learning
- **Resilience:** the “emotional courage” to persevere through challenges
- **Diverse background:** well-roundedness coming from exposure to multicultural influences and engagement in diverse extracurricular activities including sports
- **Friendliness:** being a “people person,” happy around others and eager to serve
- **Conscientiousness:** an inner drive to strive for detail-oriented excellence in completing tasks to a high standard without supervision (Patel, 2017)
- **Professional presence:** evidence of engaging in professional activities online
- **Social and emotional intelligence:** according to the CEO of Knack, a Silicon Valley start-up that uses big data and gamification in the hiring process to identify the traits of successful employees, “everything we do, and try to achieve inside organizations, requires interactions with others”; no matter what your profession or “social abilities, being able to intelligently manage the social landscape, intelligently respond to other people, read the social situation and reason with social savviness—this turns out to differentiate between people who do better and people who don't do as well” (Nisen, 2013).

In other words, the quality of your communication skills in dealing with the various audiences that surround you in your workplace are the best predictors of professional success.

Key Takeaway



Employers value employees who excel in communication skills rather than just technical skills because, by ensuring better workplace and client relations, they contribute directly to the viability of the organization.

Exercises



1. Go to the Government of Canada's Job Bank site and find your chosen profession (i.e., the job your program will lead to) via the Explore Careers by Essential Skills page. List the particular document types you will be responsible for communicating with in a professional capacity by reading closely through the Reading, Document Use, and Writing drop-downs. List the in-person responsibilities and communication technologies featured under the Oral Communication drop-down.
2. Go to the Conference Board of Canada's Employability Skills Toolkit preview document and scroll down to p. 4 (numbered p. 8). Copy the communication skills listed in the middle column. Next, format a checklist document like that on the following page (numbered p. 40). Add to it some of the other personal qualities listed in the section above. For each skill or quality, write the best example you can think of demonstrating it in your current or past employment experience, academic program of study, or personal life.

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1.1.3: A Diverse Skillset Featuring Communications Is Key to Survival

Learning Objectives



4. Consider how communication skills will ensure your future professional success

The picture painted by this insight into what employers are looking for tells us plenty about what we must do about our skillset to have a fighting chance in the fierce competition for jobs: diversify it and keep our communication skills at a high level. Gone are the days when someone would do one or two jobs throughout their entire career. Rather, if the current job-hopping trend continues, “Canadians can expect to hold roughly 15 jobs in their careers” (Harris, 2014) and the future for many will involve gigging for several employers at once rather than for one (Mahdawi, 2017).

Futurists tell us that the “gig economy” will evolve alongside advances in AI (artificial intelligence) and automation that will phase out jobs of a routine and mechanical nature with machines. On the bright side, jobs that require advanced communication skills will still be safe for humans because AI and robotics can’t so easily imitate them in a way that meets human needs. Taxi drivers, for instance, are a threatened species now with Uber encroaching on their territory and will certainly go extinct when the promised driverless car

revolution arrives in the next 10-15 years, along with truckers, bus drivers, and dozens of other auto- and transport-industry roles (Frey, 2016). They can resist, but the market will ultimately force them into retraining and finding work that is hopefully more future-proof—work that prioritizes the human element.

Indeed, current predictions from the Brookfield Institute for Innovation + Entrepreneurship at Ryerson University in Toronto are that 42% of Canadian jobs—especially low-paying ones—are at high risk of being affected by automation by the mid-2020s to 2030s. Some of those will be eliminated outright, but most will be redefined by requiring new skillsets that cannot be automated so easily. The 36% of jobs at low risk are those that require either advanced soft skills and emotional intelligence featured in roles such as managers, nurses, and teachers (Lamb, 2016), creativity, or advanced STEM skills in developing and servicing those technologies (Mahdawi, 2017; Riddell, 2017).

Since the future of work is a series of careers and juggling several gigs at once, communication skills are key to transitioning between them all. The gears of every career switch and new job added are greased by the soft skills that help convince your new employers and clients to hire you, or, if you strike out on your own, convince your new partners and employees to work with or for you. Career changes certainly aren't the signs of catastrophe that they perhaps used to be; usually they mark moves up the pay scale so that you end your working life where you should: far beyond where you started in terms of both your role and pay bracket.

You simply cannot make those career and gig transitions without communication skills. In other words, you will be stuck on the first floor of entry-level gigging unless you have the soft skills to lift you up and shop you around. A nurse who graduates with a diploma and enters the workforce quilting together a patchwork of part-time gigs in hospitals, care homes, clinics, and schools, for instance, won't still be exhausted by this juggling act if they have the soft skills to rise to decision-making positions in any one of those places. Though the job will be technologically assisted in ways that it never had been before with machines handling the menial dirty work, the fundamental human need for human interaction and decision-making will keep that nurse employed and upwardly mobile. The more advanced your communication skills develop as you find your way through the gig economy, the further up the pay scale you'll climb.

Exercises



1. Again using the Government of Canada's Job Bank site, go to the Explore Careers by Outlook page and search for your chosen profession (i.e., the job your program will lead to). Using the sources listed below as well as other internet research, explain whether near- and long-term projections predict that your job will survive the automation and AI revolution or disruption in the workforce. If the role you're training for will be redefined rather than eliminated, describe what new skillsets will "future proof" it.
2. Plot out a career path starting with your chosen profession and where it might take you. Consider

that you can rise to supervisory or managerial positions within the profession you're training for, but then transfer into related industries. Name those related industries and consider how they too will survive the automation/AI disruption.

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1.1.4: Communication Represents You and Your Employer

Learning Objectives



5. Recognize that the quality of your communication represents the quality of your company

Imagine a situation where you are looking for a contractor for a custom job you need done on your car and you email several companies for a quote breaking down how much the job will cost. You narrow it down to two companies who have about the same price, and one gets back to you within 24 hours with a clear price breakdown in a PDF attached in an email that is friendly in tone and perfectly written. But the other took four days to respond with an email that looked like it was written by a sixth-grader with multiple grammar errors in each sentence and an attached quote that was just a scan of some nearly illegible chicken-scratch writing. Comparing the communication styles of the two companies, choosing who you're going to go with for your custom job is a no-brainer.

Of course, the connection between the quality of their communication and the quality of the job they'll do for you isn't water-tight, but it's a fairly good conclusion to jump to, one that customers will always make. The company representative who took the time to ensure their writing was clear and professional, even proofreading it to confirm that it was error-free, will probably take the time to ensure the job they do for you will be the same high-calibre work that you're paying for. By the same token, we can assume that the one who didn't bother to proofread their email at all will likewise do a quick, sloppy, and disappointing job that will require you to hound them to come back and do it right—a hassle you have no time for. We are all picky, judgmental consumers for obvious reasons: we are careful with our money and expect only the best work value for our dollar.

Good managers know that about their customers, so they hire and retain employees with the same scruples, which means they appreciate more than anyone that your writing represents you and your company. As tech CEO Kyle Wiens (2012) says, “Good grammar is credibility, especially on the internet” where your writing is “a projection of you in your physical absence.” Just as people judge flaws in your personal appearance such as a stain on your shirt or broccoli between your teeth, suggesting a sloppy lack of self-awareness and personal care, so they will judge you as a person if it's obvious from your writing that “you can't tell the difference between their, there, and they're” (¶6).

As the marketing slogan goes, you don't get a second chance to make a first impression. If potential employers or clients (who are, essentially, your employers) see that you care enough about details to write a

flawless email, they will jump to the conclusion that you will be as conscientious in your job and are thus a safe bet for hire. Again, it's no guarantee of future success, but it increases your chances immeasurably. As Wiens says of the job of coding in the business of software programming, "details are everything. I hire people who care about those details" (§12-13), but you could substitute "programmer" with any job title and it would be just as true.

Key Takeaway



The quality of your communication represents the quality of your work and the organization you work for, especially online when others have only your words to judge.

Exercise



Describe an incident when you were disappointed with the professionalism of a business you dealt with, either because of shoddy work, poor customer service, shabby online or in-person appearance, etc. Explain how the quality of their communication impacted that experience and what you would have done differently if you were in their position.

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1.2: COMMUNICATING IN THE DIGITAL AGE

Learning Objectives



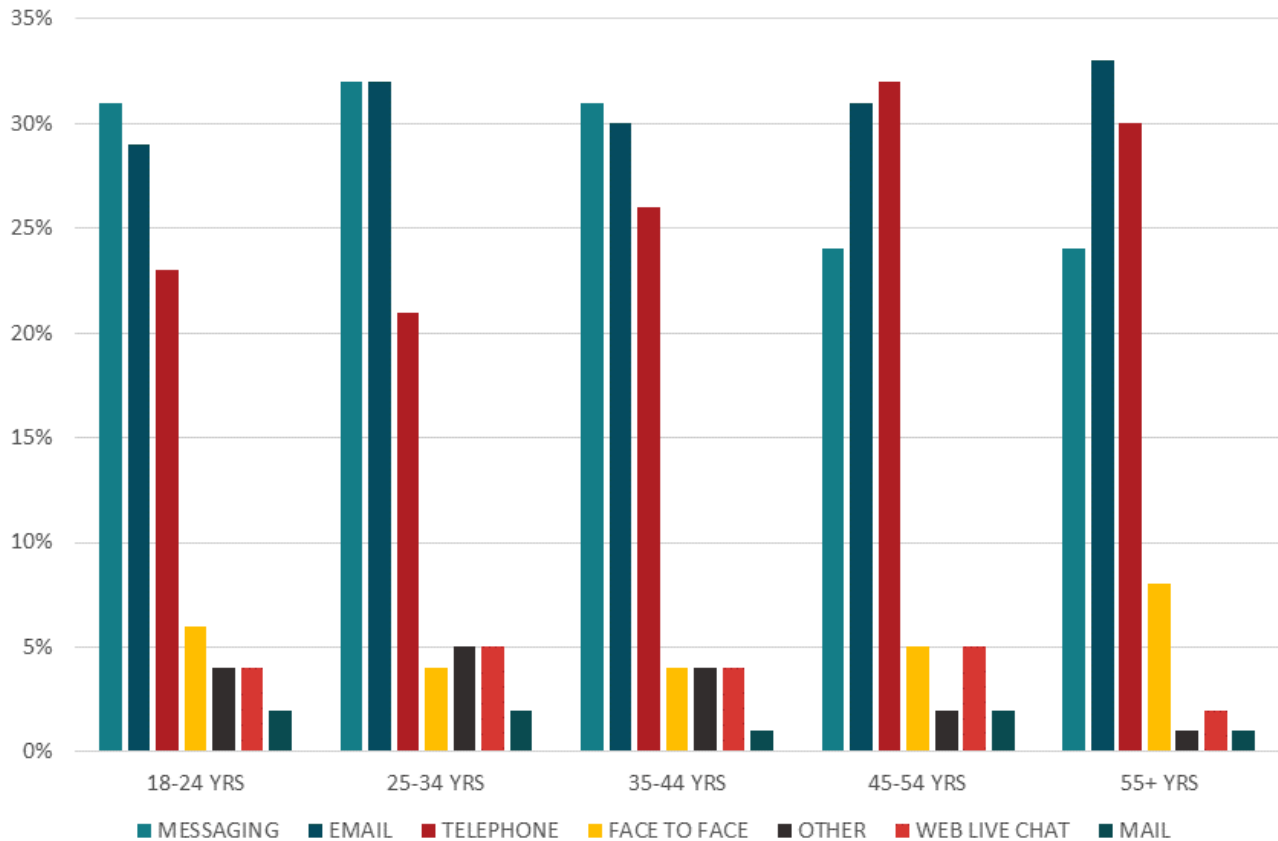
6. Distinguish between personal and professional uses of communications technology in ways that ensure career success and personal health

7. Use common, basic information technology tools to support communication.

Honestly, how many texts or instant messages do you send in a day? How many emails? Do you prefer communicating by text, instant message app (e.g., SnapChat), or generally online instead of face-to-face in person with businesses? If you're an average millennial sending out and receiving more than the 2013 average of 128 texts per day (Burke, 2016), that's a lot of reading and responding quickly in writing—so much more than people your age were doing 20 years ago. Even if just for social reasons, you are probably writing more than most people in your demographic have at any point in human history. This is mostly an advantage because it gives you a baseline comfort with the writing process, even if the quality of that writing probably isn't quite where it should be if you were doing it for professional reasons.

Where being overly comfortable with texting becomes a disadvantage, however, is when it is used as a way of avoiding the in-person, face-to-face communication that is vital to the routine functioning of any organization. As uncomfortable as it may sometimes be, especially for teens in their “cringey awkward years,” developing conversational skills throughout that decade is hugely important by the time they enter a workforce mostly populated by older generations that grew up without smartphones, developed those advanced conversational skills the hard way by making mistakes and learning from them, and expect well-developed conversational skills of younger generations entering the workforce. Though plenty of business is done online these days, there really is no good substitute for face-to-face interaction.

According to Twilio's 2016 consumer report on messaging, however, the most preferred channel for customer service among 18-24 year-olds (said 31% of respondents) is by text or instant messaging, followed closely by email (p. 8). Face-to-face interaction, however, is preferred by only 6% of respondents.



	Messaging	Email	Telephone	Face to Face	Other	Web Live Chat	Mail
18-24 years	31%	29%	23%	6%	4%	4%	2%
25-34 years	32%	32%	21%	4%	5%	5%	2%
35-44 years	31%	30%	26%	4%	4%	4%	1%
45 – 54 years	24%	31%	32%	5%	2%	5%	2%
55+ years	24%	33%	30%	8%	1%	2%	1%

Figure 1.2: Preferred customer service channel by age group (Twilio, 2016)

Customer service aside, face-to-face interactions are still vitally important to the functioning of any organization. In a study on the effectiveness of in-person requests for donations versus requests by email, for instance, the in-person approach was found to be 34 times more successful (Bohns, 2017). We instinctively value human over machine interaction in many (but not all) situations we find ourselves. Though some jobs like nurse or therapist simply cannot function without in-person interaction and would be the last to be automated (if ever), most others will involve a mix of written and face-to-face communication.

Our responsibility in handling that mix requires that we become competent in the use of a variety of devices that bring us a competitive advantage in our work (see Table 1 below). By working in the cloud with our smartphones and laptop, desktop, or tablet devices, for instance, we can collaborate with individuals or teams anywhere and anytime, as well as secure our work in ways we couldn't when files were tied to specific devices. Through the years, new technology trends will offer up new advantages with new devices that we will have to master to stay competitive.

Those advantages are double-edged swords, however, so it is important that we manage the risks associated with them. With so much mobile technology enabling us to communicate and work on the go, from home, or anywhere in the world with a wi-fi connection, we are expected to be always available to work, to always be “on”—even after hours, on weekends, and on vacation—lest we lose a client to someone else who is available at those times. The early bird gets the worm. Add to that the psychological and physiological impacts of adults averaging 8.8 hours of screen time per day (Dunckley, 2014; Twenge, 2017; Nielsen, 2016, p. 4), and it's no wonder that problematic technology use, including screen addiction, is a growing concern among both health and technology experts (Phillips, 2015). Beyond being an effective communicator and professional in general, just being an effective *person*—in the sense of being physically and mentally healthy—requires knowing when *not* to use technology.

But in the workplace, especially if it's a traditional office environment, we must be savvy in knowing which technology to use rather than always reach for our smartphones. The modern office offers up a variety of tools that increase productivity and raise the bar on the quality and appearance of the work we do. You must be competent in the use of the latest in presentation technology, voice and video conferencing, company intranets, multifunctional printers, and so on. Even using the latest industry-wide software and social media apps ensures that your communication looks and functions on-point rather than in an antiquated way that makes you look like you stopped trying six years ago.

All such technology will change rapidly in our lifetimes, some will disappear completely, and new devices and software will emerge and either dominate or also disappear. So long as others are using the dominant technology for an advantage in your type of business, then it's on you to use them also to avoid falling behind and getting stuck on obsolete technology that fewer and fewer people use. Depending on how successful you're driven to be, you would be wise to even get ahead of the curve by adopting emerging technology early.

Key Takeaway



Use an array of dominant communications technology to maintain a competitive advantage, and know when to put it all away in favour in-person communication.

Exercises



1. Keep a daily journal recording the length of time you spend using various screen devices such as your smartphone, tablet, laptop, desktop, TV, etc. Also record the amount of time you use these for school-related activities, social networking activities, entertainment (which you can further break down into passive viewing, such as watching Netflix and YouTube videos, and interactive use such as gaming). What conclusions can you draw from quantifying your screen time? Are your habits consistent each day or throughout the week? Explain what benefit you derive from these activities and how they might help and hinder your professional development.
2. Record how many texts or instant messages you send and receive per day over the course of a week. Count how many you sent because you had good reason to do so by text (as opposed to phone call), such as to reply in the same channel you received a message or to send a message quietly so as to avoid disturbing others around you (e.g., in class or late at night). Identify how many messages you could have exchanged merely by calling the person up and having a quick back-and-forth or waiting to talk to them in person. What conclusions can you draw from quantifying your messaging habits?
3. Research what future technology might revolutionize the work you're training to do. Bearing in mind the job description on the Government of Canada's Job Bank Explore Careers by Essential Skills page, what tasks identified there can be automated? What will still be done by you because it involves the human element that can't be automated?

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1.3: THE COMMUNICATION PROCESS

Learning Objectives



8. Illustrate the communication process to explain the end goal of communication

Stripping away the myriad array of technology and channels we use to communicate, at its core the whole point of communication is to move an idea from your head into someone else's so that they understand that idea the same way you do. If there is work to be done to ensure that the person receiving a message understands the sender's intended meaning, the responsibility falls mainly on the sender. But the receiver is also responsible for confirming their understanding of that message, making communication a dynamic, cyclical process.

Breaking down the communication cycle into its component parts is helpful to understand your responsibilities as both a sender and receiver of communication, as well as to troubleshoot communication problems. First, let's appreciate how amazing it is that you can form an idea as an incredibly complicated pattern of electrical impulses in your brain and plant that same pattern of impulses in someone else's brain very easily. It may sound complicated, but you are wired to do this every second of the day.

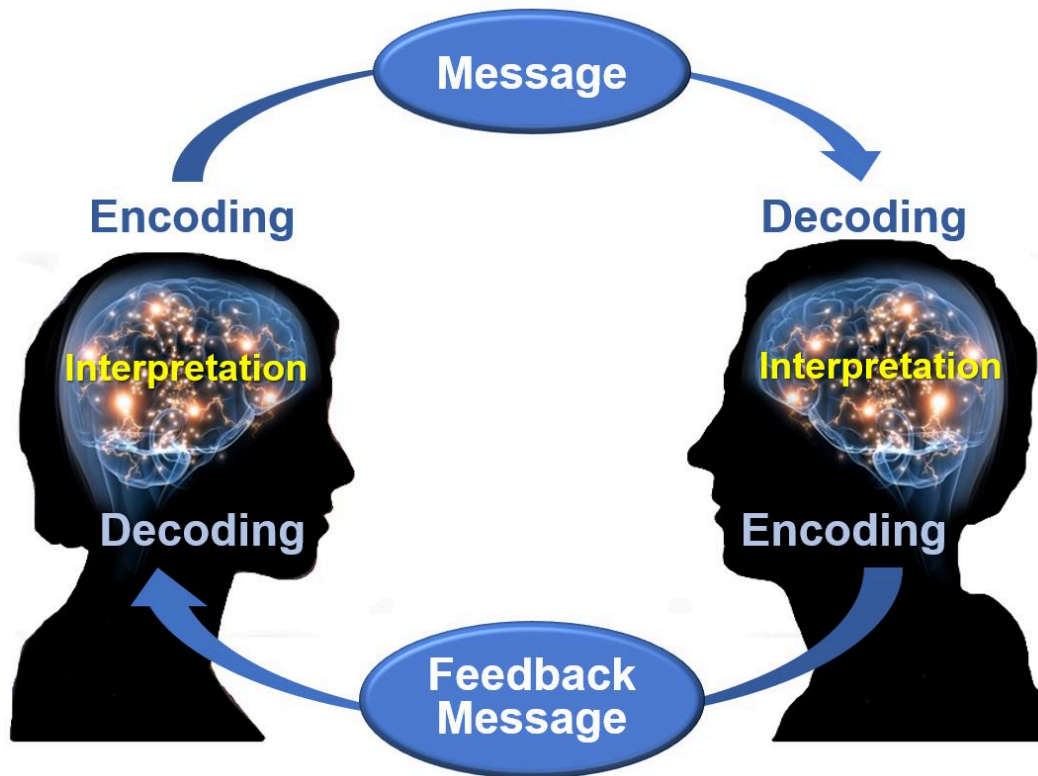


Figure 1.3: The Osgood-Schramm model of communication.

Sources: Kisspng, 2018; Web Editor 4, 2017

According to the Osgood-Schramm model of communication (1954), you first **encode** an idea into a **message** when you want to communicate that idea with the outside world (or even just to yourself). If you choose to send that message in the **channel** of in-person speech (as opposed to other spoken, written, or visual channels, examples of which are listed in Table 1), you first form the word into the language in which you will be understood, then send electrical impulses to your lungs to push air past your vocal chords, send electrical impulses to vibrate your vocal chords to bend the air into a sound, shape those sound waves further with your jaw, tongue, and lips, send that sound on its way through the air till it reaches the eardrum of the **receiver**, which vibrates in a manner that tickles the cochlear cilia in their inner ear, which sends a patterned electrical impulse into their brain, which proceeds to **decode** that impulse into the same pattern of electrical impulses that constitute the same idea that you had in your brain.

Table 1.3: Examples of Communication Channels

Verbal	Written	Visual
In-person speech	Email	Drawings, paintings
Phone conversation	Text, instant message	Photos, graphic designs
Voice-over-internet protocol (VoIP)	Report, article, essay	Body language (e.g., eye contact, hand gestures)
Radio	Letter	Graphs
Podcast	Memo	Font types
Voicemail message	Blog	Semaphore
Intercom	Tweet	Architecture

To ensure that the message was decoded properly and understood, the receiver then encodes and sends an intentional or unintentional **feedback** message that the first sender receives and decodes; when the first sender understands that the receiver understood the first message, then the goal of the communication process has been achieved. If you stated, for instance, “I’m hungry” and the receiver of that message responded by saying, “Me too. Let’s get a taco,” you can be sure that they understood your intended meaning without them stating that they understood. From there, the message and feedback can continue to cycle around in a back-and-forth conversation that exchanges new ideas and offers opportunities for the receiver of those messages to ask for clarification if understanding isn’t achieved as intended.

But the receiver’s intentional or unintentional feedback message need not be in the same channel as the sender’s. If the receiver of the above “I’m hungry” message nodded and held up a cookie for you to take instead of saying anything at all, it would be clear from their intentional nonverbal expressions and actions that they correctly decoded and understood your meaning: that you’re not only hungry, but also that your hunger would be somewhat relieved by the cookie at hand. And if the receiver responded in no other way but with a rumble of their stomach, their unintentional feedback also confirmed understanding of the message.

As you can see, this whole process is easier done than said because you encode incredible masses of data to transmit to others all day long in multiple channels, often at once, and are likewise bombarded with a constant multi-channel stream of information in each of your five senses that you decode without being even consciously aware of this complex process. You just do it. Even when you merely talk to someone in person, you’re communicating not just the words you’re voicing, but also through your tone of voice, volume, speed, facial expressions, eye contact, posture, hand movements, style of dress, etc. All such channels convey information besides the words themselves, which, if they were extracted into a transcript of words on a page or screen, communicate relatively little. In professional situations, especially in important ones such as job interviews or meetings with clients where your success depends entirely on how well you communicate across the verbal and all the nonverbal channels, it’s extremely important that you be in complete control of all of

them and present yourself as a detail-oriented *pro*—one they can trust to get the job done perfectly for their money.

Key Takeaway



As a cyclical exchange of messages, the goal of communication is to ensure that you've moved an idea in your head into someone else's head so that they understand your idea as you understood it.

Exercises



1. Without looking at the communication process model above, illustrate your own theory of how communication works and label the diagram's parts. Compare it to the model above and discuss the advantages and disadvantages of each.
2. Table 1 above compiles only a partial list of channels for verbal, written, and visual channels. Extend that list as far as you can push it.

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1.4: TROUBLESHOOTING MISCOMMUNICATION

Learning Objectives



9. Troubleshoot communication errors by breaking down the communication process into its component parts

Now with a basic overview of the communication process under our belts, troubleshooting miscommunication becomes a matter of locating where in the cyclical exchange of messages lies the problem: with the sender and the message they put together, the receiver and their feedback message, or the channel in the context of the environment between them. Identifying the culprit can help avoid one of the most costly errors in any business. According to Susan Washburn, communication problems can lead to:

- Conflict, damaged relationships, and animosity within an office and lost business with clients
- Productivity lost and resources wasted fixing problems that could have been avoided with proper communication
- Inefficiency in taking much longer to do tasks easily completed with better communication, leading to delays and missed deadlines
- Missed opportunities
- Unmet objectives due to unclear or shifting requirements or expectations

Let's examine some of these in the real and imaged scenarios below.

If the receiver of the above "I'm hungry" message responded with something like "Yes, and I'm Romania," to the sender the receiver would appear for a moment to have misunderstood the message as it was intended, though indeed the receiver did but chose to respond in a way that plays with the unintended possible misinterpretation of "hungry" as the homophone (a word that sounds the same as another completely different word) "Hungary," a European country next to Romania. Part of the beauty and fun of language is that words—especially spoken ones—can have multiple meanings, which means that senders must be careful to anticipate potential misinterpretations of their messages due to carelessness towards ambiguities. In any case,

once the joke is understood, the first sender can rest assured that the feedback message still confirms that the first message was understood, which is the end goal of communication.

Most jokes toy with communication breakdowns in harmless ways, but when breakdowns happen unintentionally in professional situations where opportunities, money, and reputations are on the line, their serious costs make them no laughing matter. Take, for instance, the misplaced comma that cost Rogers Communications \$1 million in a contract dispute over New Brunswick telephone poles (Austen, 2006) or the absence of an Oxford comma that cost Oakhurst Dairy \$10 million in a Maine labour dispute (Associated Press, 2017). In both cases, everyone involved would have preferred to continue with business as usual rather than sink time and resources into protracted legal and labour disputes all stemming from a mere misplaced or missing comma. To avoid costly miscommunication in any business or organization, senders and receivers must be diligent in fulfilling their communication responsibilities and be wary of potential misunderstandings throughout the communication cycle outlined above.

1.4.1: Sender-related Miscommunication

The responsibility of the sender of a message is to make it as easy as possible to understand the intended meaning. If work must be done to get your point across, it is on you as the sender to do all you can to make that happen. (The receiver also has their responsibilities that we'll examine below, but listening and reading are not necessarily as labour-intensive as composing a message in either speech or writing.) This is why grammar, punctuation, and even document design in written materials, as well as excellent conversational and presentation skills, are so important: sender errors in these aspects of communication lead to readers' and audiences' confusion and frustration, which get in the way of their understanding the meaning you intended. If senders of messages fail to anticipate their audience's needs and miss the target of writing or saying the right thing in the right way to get their messages across, they bear the responsibility for miscommunication and need to pay close attention to the lessons throughout this textbook to help them get back on target.

If the sender has any doubt that their message is being understood, it's also on them to check in to make sure. If you are giving a presentation, for instance, you can employ several techniques to help ensure that your audience stays with you:

- Ensure that they can properly hear you by projecting your voice so that even the people in the back row can hear you properly; check that they can by asking if they can hear you just fine.
- Get them involved and engaged by asking for a show of hands on a topical question.
- Ask them to ask questions if they don't understand anything; make them feel at ease to ask questions by saying that there are no stupid questions and that if a question occurs to any one of them, it is probably also occurring to the rest.
- Flag important points and, several minutes later, ask them to summarize them back to you when you are

relating them to another major point.

1.4.2: Channel-related Miscommunication

Errors can also be blamed on the medium of the message such as the technology and the **environment**—some of which can slide back to choices the sender makes, but others are out of anyone’s control. If you need to work out the terms of a sale with a supplier a few towns over before you draw up the invoice and time is of the essence, sending an email and expecting a quick response would be foolish when you (a) have no idea if anyone’s there to write back right away, and (b) would potentially need to go back and forth over the terms; this exchange could potentially take days, but you only have an hour. The smart move is instead to phone the supplier so that you can have a quick back-and-forth. If you need to, you could also text them to say that you’re calling to hammer out the details before writing it up. Of course, you wouldn’t call using a cellphone from inside a parking garage because blame for problems with the reception (or **interference**) would slide back on you for not positioning yourself appropriately given the available environments. If phone lines and the internet are down due to equipment malfunction (despite paying your bills and buying trustworthy equipment), however rare that might be, the problem is obviously out of your hands and in the environment. Otherwise, it’s entirely up to you to use the right channels the correct way in the environments best suited to clear communication to get the job done.

1.4.3: Receiver-related Miscommunication

The responsibility of the receiver of a message is to be able to actively read or hear not only the message itself, but also to understand the nuances of that message in context. Say you were a relatively recent hire at a company and were in line for a promotion for the excellent work you’ve been doing lately, it’s 11:45am, you just crossed paths with your manager in the hallway, and she’s the one who said “I’m hungry” (to use our example from above). That statement is the **primary message**, which simply describes how the speaker feels. But if she says it in a manner that, with nonverbals (or **secondary messages**) such as eyebrows raised signalling interest in your response and a flick of the head towards the exit, suggests an invitation to join her for lunch, you would be foolish not to put all of these contextual cues together and see this as a professional opportunity worth pursuing. If you responded with “Enjoy your lunch!” your manager would probably question your social intelligence and whether you would be able to capitalize on opportunities with clients when cues lined up for business opportunities that would benefit your company. But if you replied, “I’m starving, too. May I join you for lunch? I know a great place around the corner,” you would be correctly interpreting **auxiliary messages** such as your manager’s intention to assess your professionalism outside of the traditional office environment.

Say you arrive at the lunch spot with your manager and sit down to eat, but it’s too noisy to hear each other well; you would be equally foolish to use this environmental problem as an excuse not to talk and instead just

browse your social media accounts on your phone (perhaps your usual lunchtime routine when eating solo) in front of her. You could accommodate her need to hear you by raising your voice, but the image of you shouting at your manager also sends all the wrong messages. Rather, if you cite the competing noise as a reason to move to a quieter spot where you can converse with her in a way that displays the polish of your manners and ultimately positions you nicely for the promotion, she would understand that you have the social intelligence to control the environmental conditions in ways that prioritize effective communication.

Of course, so much more can go wrong with the receiver. In general, the receiver may lack the knowledge to understand your message; if this is because you failed to accommodate their situation—say you used formal language and big, fancy words but they don’t understand because they are EAL (English as an additional language)—then the blame shifts back to you because you can do something about it. You could instead use more plain, easy-to-understand language. If your audience is a co-worker who should know what you’re talking about when you use the jargon of your profession, but they don’t because they’re in the wrong position and in over their head, the problem is with the receiver (and perhaps the hiring process).

Another receiver problem may have to do with attitude. If a student, for instance, believes that they don’t really need to take a class in Communications because they’ve been speaking English for 19 years, think their high school English classes were a complete joke, and figure they’ll do just fine working out how to communicate in the workplace on their own, then the problem with this receiver is that overconfidence prevents them from keeping the open mind necessary to learn and take direction. Carried into the workplace, such arrogance would prevent them from actively listening to customers and managers, and they would most likely fail until they develop necessary active listening skills (see below). Employers like employees who can solve problems on their own, but not those who are unable to take direction.

The picture emerging here, then, is one where many factors must work in concert to achieve communication of intended meaning. The responsibility of reaching the goal of understanding in the communication process requires the full cooperation of both the sender and receiver of a message to make the right choices and avoid all the perils—personal and situational—that lead to costly miscommunication.

Key Takeaway



Being an effective professional involves knowing how to avoid miscommunication by upholding one’s responsibilities in the communication process towards the goal of ensuring proper understanding.

Exercise



Describe a major miscommunication that you were involved in lately and its consequences. Was the problem with the sender, channel, environment, receiver, or a combination of these? Explain what you did about it and what you would do (or advise someone else to do) to avoid the problem in the future.

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1.5: LISTENING EFFECTIVELY

Learning Objectives



10. Reframe information gained from spoken messages in ways that show accurate analysis and comprehension

If most communication these days is text-based, why is it still important to be an effective listener? Can't we just wait till everyone who's grown up avoiding in-person contact in favour of filtering all social interaction through their smartphones dominate the workforce so that conversation can be done away with at last?

No. Perhaps the first rule in business is to know your customer. If you don't know what they want or need, you can't successfully supply that demand and no one's going to buy what you have to sell. If you don't *actively* listen to what your customers or managers say they want, or fail to piece together what they don't know they want from their description of a problem they need solved, then you may just find yourself always passed over for advancement. Business "intel" gleaned from conversation is the lifeblood of any business, as is the daily functioning of anyone working within one.

A receiver's responsibilities in the communication process will be to use their senses of hearing, vision, and even touch, taste, and smell to understand messages in whatever channels target those senses. In the case of routine in-person communication, active listening and reading nonverbal social cues are vitally important to understanding messages, including subtext—that is, significant messages that are not explicitly stated but must be inferred from context and nonverbals. In the above case of the manager saying she's hungry, for instance, she did not say "Join me for lunch so I can base my decision about whether to promote you on your social graces, emotional intelligence, and conversational ability." Rather, plenty of reading between the lines was required of the receiver to figure out that:

1. This is an invitation to lunch that ought to be accepted
2. Given the context, the invitation suggests that the manager is considering the receiver for the promotion (otherwise she would avoid the receiver altogether)
3. This opportunity should be treated like an informal job interview

With so much of the communication process's success riding on the responsibility of the receiver to

understand both explicit and implicit messages, effective, active listening skills are keys to success in any business.

1.5.1: Receiver Errors

Unfortunately, plenty can go wrong on the receiver's end in listening effectively and making the right inferences. We've already looked at the possibility that they may just lack knowledge about both the job and the broader context to understand fully the content of workplace messages and their underlying meanings. They may be:

- A poor reader of nonverbal social cues due to a lack of experience in developing conversational skills
- Distracted by what's on their devices
- Experiencing too much internal “semantic noise” interference from their minds wandering off topic with distracting thoughts about non-work-related things even during work communication
- Too preoccupied rehearsing what they're going to say on a topic because they would rather speak than listen, or they listen only to reply rather than to understand
- Trying to multitask by reading or browsing while listening, but doing neither very effectively (Sanbonmatsu et al., 2013)

Many students struggle with this. Some have difficulty being patient enough to listen and would rather speak, otherwise known as grandstanding. In all such cases, the problem is passive listening—when you merely hear noises and barely register the meaning of the message because you have preoccupying internal agenda that is more compelling. Once again, however, communication requires that you do your fair share to ensure that the sender's meaning is understood.

1.5.2: Be an Active Listener

Fortunately, everyone can practice being a more effective listener by making themselves aware of their own listening habits and actively seeking to improve them. Doing so certainly takes work, especially if your listening habits have been largely passive for most of your life and your attention span is short from a steady diet of small units of media content such as memes. If your problem is that your mind wanders, you must train yourself to focus on the message at hand rather than consume other media in a failed effort to multitask or get distracted by the internal monologue that tries to whisk you away from the present. Work on just being *present*. Take the earbuds out and keep your cellphone in your pocket when someone is talking, including your college instructors. (When your instructors see you staring intently in the direction of your crotch under your desk and your hands are twitching a little down there, they're not stupid; they know you're fiddling with your phone.)

Would you tolerate someone blatantly ignoring you to focus on their phone if you were speaking right in front of them? It's just plain rude and doing this yourself could, in professional situations, get you blacklisted by managers, coworkers, and customers, resulting in missed opportunities.

Rather, maintain strong eye contact with the speaker to show active interest. Resist the social anxiety-driven urge to avert your eyes as soon as pupil-to-pupil contact lasting more than a second or two makes the human connection too real for comfort. Challenge that. Eye contact builds trust, so don't signal to the speaker that you have something to hide (such as a lack of confidence in yourself) by darting your eyes away. But don't fake attention either by maintaining eye contact while your mind is a million miles away; good communicators can tell from your nonverbals (like nodding in agreement at the wrong things) when the lights are on but no one's home.

Perhaps the best strategy for active listening is to devote your brain's full processing power to the message at hand. One way you can do this is to paraphrase the message (i.e., re-state it in your own words) then ask the speaker if you understood it correctly. Translating the message into words that resonate more with you than what the speaker used helps you remember it because you've personally invested yourself in it. You can find a way to make it your own without necessarily agreeing with it (but that helps, too). By doing this, you signal to the speaker that you've completed the whole goal of communication: to understand the sender's meaning as they intended it.

Another processing strategy is to think of questions you can ask for clarification. No matter how thorough a speaker covers a topic, you can probably find gaps to ask about for clarification. "I understand that you're saying A, B, and C, but what happens to those in situations X, Y, and Z?" Identifying gaps requires keen interest and strong processing power of your brain. But it's the kind of processing that sends the auxiliary message that you are interested in what the speaker says, which may lead to a deeper conversation and connection—the holy grail of networking.

Figuring out when to talk and when to listen also requires social skills. If you like to grandstand and you get impatient when someone else is talking, you must practice exercising some impulse control. Take turns! By hearing them out and reserving judgment, you can really learn something. If you're dealing with someone like that—one who monologues and doesn't know when to pass the ball—you must be a good reader of nonverbal cues to capitalize on the right moment to jump in with the right thing to say. On the other end of the spectrum, it takes skill to know how to draw people who communicate mostly in silence out of their shell if it means that you will mutually benefit from it on a business or personal level.

If you spent too much of your youth lost in screen time rather than interacting in person with friends, however, there's no time like now and the rest of your life to begin favouring human contact over technology. Of course, the technology will always be there and you'll be great at using it when the situation calls for it. But your professional and personal well-being depends on knowing how and when to do without it and to get back to what really matters: being human. From there, professional success follows from keeping the communication channels open to solve problems collaboratively one conversation at a time.

Key Takeaway



The receiver of a message plays a significant role in ensuring that the goal of understanding is achieved, which means active listening in the case of spoken messages.

Exercises



1. Pair up with a classmate and do a role-play exercise where one of you tries to explain how to do something while the other multitasks and interrupts. Quiz the multitasker to see if they remember specific steps in the procedure described. Then try it again while the listener practices active listening. How do the two communication experiences compare? Discuss your findings.
2. In a half-hour period of conversation with friends, see if you can count how many times you are interrupted, but don't tell them ahead of time that you're counting for this. Share and compare with your classmates.
3. Take *Psychology Today's* 33-question (15 min.) Listening Skills Test. Grab a screenshot of your results and, below it and the heading "Barriers to Effective Listening," write five barriers that particularly annoy you or prevent you from being an active listener—both that you notice in other people and in yourself. Below that and the heading "Effective Listening Strategies," list five strategies, one for each of the barriers listed above, each identifying a strategy for overcoming the barrier.

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PART II

UNIT 2: THE WRITING PROCESS



Common COMM Course Learning

Outcomes

This unit supports the following course learning outcomes (*COMM 3048, COMM 3073, COMM 3074, COMM 3075, COMM 3077, COMM 3080, COMM 3082*):

- **2. Analyze** an audience and tailor a message to that audience (objective/subjective writing, persuasive writing, internal/external audience).
- **3. Apply** principles of grammar, punctuation, and editing appropriate to professional writing.
- **4. Prepare** documents according to basic principles of formatting and visual communication in various written documents.
- **7. Employ** research skills including locating, selecting, evaluating, and documenting source materials.

COMM 3020:

- **1. Communicate** clearly, concisely and correctly in the written, spoken and visual form that fulfills the purpose and meets the needs of the audience.
- **4. Compose** stylistically appropriate business documents.
- **7. Synthesize** research sources in an APA-style, analytic report.
- **10. Implement** principles of properly documenting the use of research sources and others' ideas.

CHAPTER 2: THE WRITING PROCESS I: PREPARING

Jordan Smith

Chapter Learning Objectives

1. Distinguish between general and specific purposes for writing.
2. Analyze primary and secondary audiences using common profiling techniques
3. Identify techniques for adjusting writing style according to audience size, position relative to you, knowledge of your topic, and demographic.
4. Distinguish between communication channels to determine which is most appropriate for particular situations.
5. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
6. Use common, basic information technology tools to support communication.

Like communication in general, good writing comes from following a process. Between an author hatching an idea and the audience reading and understanding that idea, the writing process enables the author to craft messages in a time-efficient manner that ultimately meets the needs of the audience. Without following a four-stage process from (1) preparing to (2) information gathering, to (3) drafting, to (4) editing through to sending the message, an author can waste plenty of their own time writing what doesn't need to be written and wasting the reader's time by confusing them with a message that doesn't meet their needs. The next four chapters deal with each of these four writing stages, dividing them into several steps that, when followed as a matter of habit, can save you time by helping you write no more or less than you need to in achieving your professional communication goals.

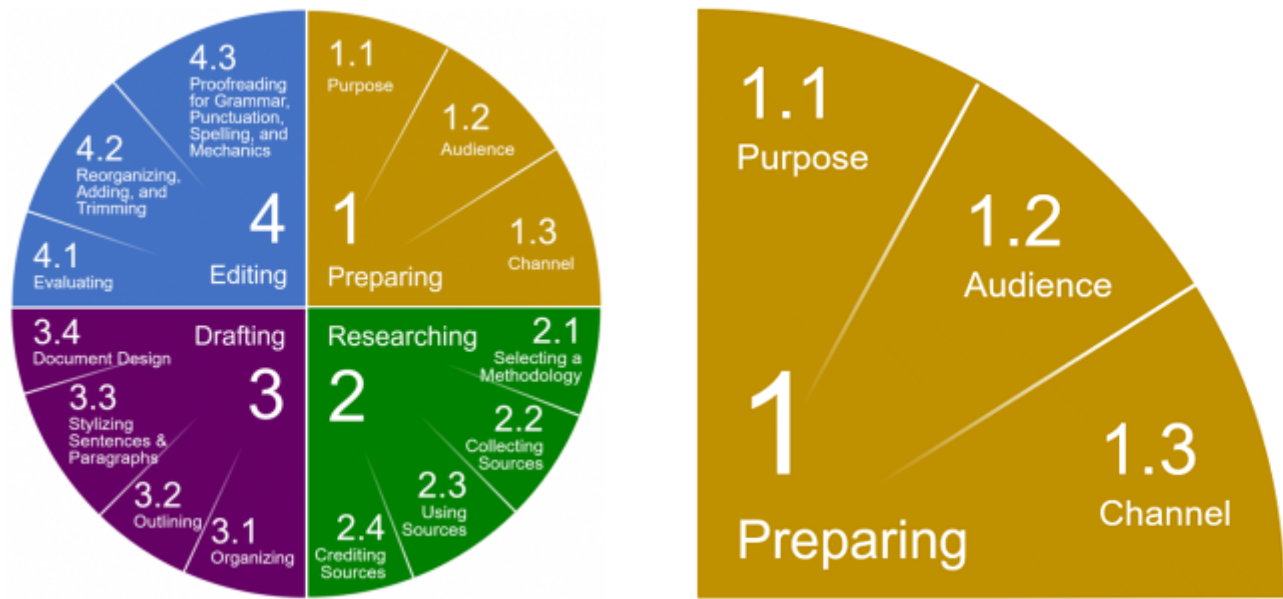


Figure 2: The four-stage writing process and Stage 1 breakdown

- 2.1: Knowing Your Purpose for Writing
- 2.2: Analyzing Your Audience
- 2.3: Selecting Appropriate Channels

2.1: KNOWING YOUR PURPOSE FOR WRITING

Learning Objectives



1. Distinguish between general and specific purposes for writing.
5. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Rarely does anyone write for professional reasons just for fun. Whether you're dashing off a quick email, filling out a work order, or composing a large market research report, there's a good reason for doing it—related, even if in a roundabout way, to getting paid for contributing to the profitability of an organization. Knowing your reason for writing is essential to staying on track in a writing process that, if followed from beginning to end, will save you time and effort by helping you write no more or less than you have to. The next four chapters will break down this writing process into four stages—preparing, researching, composing, and editing—each with a few sub-stages. But the whole process starts with knowing your purpose, which will guide you towards writing an effective message in a document appropriate for the audience and occasion.

Getting back to the communication process examined in the previous chapter, we can say that all communication, including writing documents, involves both a general and a specific purpose regarding the feedback message. The **general purpose** is the end-goal of communication such as aiming to inform, persuade, motivate, entertain, or a combination of these and other effects. The hope is that a sender's message will come back as a feedback message proving that the receiver correctly understood the information, was persuaded to support an idea, was motivated to follow a desired action, was amused, etc. With the end goal in mind, the effective writer reverse-engineers the message to achieve the desired effect.

The most common general purpose of workplace messages is to inform. Most emails, memos, and reports cover a topic thoroughly and precisely with the journalistic 5 Ws + H subtopics

- Who
- What
- Where
- When

- Why
- How

How much weight you give each subtopic (or any weight at all) depends on the situation. Sometimes the *why* isn't important and other times a rationale is crucial to an information message that also requires persuasion. Take, for instance, an email by a construction contractor responding to a customer inquiry about whether they can do a bathroom renovation. A thorough response would include details such as *what* exactly would need to be done and how (a labour itemization as part of the price estimate), *how* many workers would be assigned to the job (the *who*), and how long it would take (the *when*). Details such as the *where* and *why* are already given (e.g., the bathroom is being renovated because it is 25 years out of style and the baseboards are mouldy) although the contractor may provide an estimate that includes explanations detailing why the price might fluctuate given unknown factors such as delayed materials shipments and midway design changes by the client.

The **specific purpose** always depends on the situation at hand. If the general purpose of the above estimate is to inform, the specific purpose is to provide a written record of the probable price so that the customer can compare estimates from other companies and decide which offers the best value. Specific purposes may involve ulterior motives—hence secondary or tertiary purposes besides the primary general purpose. The contractor may, for instance, use the opportunity to provide a brochure illustrating attractive-looking past reno jobs to give the customer a sense of the quality of work the contractor does and inspire them with options ahead of their design consultation. Such marketing falls under secondary general purposes related to credibility and persuasion

Of course, any communicator must ensure that their purpose is realistic, which again affects the credibility of the message. If, for instance, the contractor priced themselves out of a job by providing a \$40,000 bathroom reno estimate to a lower- or middle-income customer, the goal of winning the contract would fail for the contractor having misjudged the customer's price range. All customers and employers seek the greatest value—preferably higher quality at lower cost. If professionals fail to strike a realistic balance by offering low quality at unreasonably high cost or “over-promise and under-deliver” with a too-good-to-be-true offer of extremely high quality at very low cost (unless this is a “loss-leader” marketing strategy for more regularly priced work to follow), they will be seen as lacking credibility either way.

Key Takeaways



Knowing your general and specific purposes for writing at the outset of the writing process helps keep you on track with topic selection.

Exercises



Select a letter you've recently received in the mail (or one your roommate, friend, or family member has received) from a company or organization, ideally a promotional or campaign letter rather than one too specific to your or the recipient's situation, and describe both its general and specific purposes. If its general purpose included informing (recall that a document can have more than one general purpose), identify the subtopics (5 W's + H).

2.2: ANALYZING YOUR AUDIENCE

Learning Objectives



2. Analyze primary and secondary audiences using common profiling techniques
3. Identify techniques for adjusting writing style according to audience size, position relative to you, knowledge of your topic, and demographic.
5. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Just as the first commandment in any business is “Know thy customer,” so the first in communication is “Know thy audience.” And just as any business thrives or dies by how well it supplies a customer demand, any act of communication’s success depends entirely on how well the sender tailored it to meet the needs and expectations of the audience. Sometimes that audience is a person or group you know; sometimes it’s a person or group you don’t, but you always adjust your message content and style to what you know or can guess at about them. You wouldn’t speak to a customer approaching you for the first time the same way you would a co-worker buddy, nor would you speak to your manager the same way you would speak to either of the others (depending on what type of manager you have). In each case, you adjust the level of detail in your content, as well as your tone, word choices (diction), grammar, and overall style (formal or casual) based on how you’ve profiled your audience.

Profiling or analyzing your audience takes skill and consideration. When you sit down to write, ask yourself the following questions:

- **How big** is my main audience? Is it one person, two, a few, several, a dozen, dozens, hundreds, or an indeterminately large number (the public)?
- Who might my **secondary** or **tertiary audiences** be (e.g., people you can see CC’d or people you can’t because they could be forwarded your email without you knowing)?
- What is my professional or personal **relationship** to them relative to their **position/seniority** in their organization’s hierarchy?
- How much do they already **know** about the topic of my message?
- What is their **demographic**—i.e., their age, gender, cultural background, educational level, and beliefs?

The following subsections delve further into these considerations to help you answer the above questions in specific situations.

2.2.1: Writing for Audiences of Various Sizes

Writing to one person is a relatively straightforward task, but you must adjust your writing style to accommodate a larger audience. When emailing one person, for instance, you can address them by name in the opening salutation and continue to use the second person singular *you* throughout. When addressing two or three, say for a project that involves 2-3 partners (including you, making 3-4 altogether), you would likewise address them each by name, either in alphabetical order or in order of who is primarily involved and then descending in size of contribution. Past four, however, you may start to use collective salutations such as “Hello, team,” or “Hi, all.” Luckily, the second-person plural pronoun *you* is the same as the singular. For small audience such as this, your style can generally follow the conversational rapport you’ve developed with them, whether that be formal or informal, humourless or humorous, literal or expressive, and so on.

The larger the group, however, the more general and accessible your language has to be. When writing for an indeterminately large group such as the consumer public, say in a blog on your company’s website, your language must be as plain and accessible as possible. In Canada, the public includes readers who will appreciate that you use simple words rather than big, fancy equivalents because English may be their second or third language. Indeed, the Government of Canada has published a handy guide for how to write accessibly in plain language:

Use Familiar language, known as expressions and illustrations

Tips:

- Choose familiar, everyday words and expressions (*e.g., “quite” rather than “relatively”*)
- Define specialized words and difficult concepts, illustrate them with examples and provide a glossary when it is necessary to use several such words/concepts
- Choose concrete rather than abstract words and give explicit information (*e.g., “car crash” rather than “unfortunate accident”*)
- Avoid jargon and bureaucratic expressions
- Use acronyms with care and only after having spelled them out
- Choose one term to describe something important and stick to it; using various terms to describe the same thing can confuse the reader
- Add tables, graphs, illustrations and simple visual symbols to promote understanding

Examples:

Instead of:	Use:
23-01-2003	January 23, 2003
We can reasonably speculate that young adults want to hear about terrorism and security issues.	Young adults are likely to want to hear about terrorism and security.
Tax payers are encouraged to e-file their tax returns.	Did you know that you can file your tax returns on the internet?

Source: Communication Canada (2003, p. 16)

To reinforce these lessons on plain language, you can examine US Government resources on the topic such as the “Principles of Plain Language” PowerPoint on their Tools page (PLAIN, 2011) and do a selection of plain language exercises (PLAIN, n.d.).

Likewise, your writing to large audiences cannot reveal any bias in terms of gender, ethnicity, age, ability, or orientation lest you offend members of that group. Because using masculine singular pronouns like *he*, *his*, and *him* would exclude the female half of your audience, for instance, you would use the gender-neutral plural pronouns *they*, *their*, and *them* instead. (Using those plural pronouns for singular situations is also becoming acceptable, although you might want to avoid doing that if writing to someone you know is a grammar stickler unless you discover that they are fine with the practice.) When identifying people by their role, use non-gender-exclusive equivalents. See Queen’s University’s (2014) Inclusive Language Guidelines page for more on avoiding bias in your writing.

The larger the group, the more careful you must be with using unique English idioms as well. Idioms are quirky or funny expressions we use to make a point. If you wanted to reassure a customer who recently immigrated from North Africa, for instance, before explaining an automotive maintenance procedure unique to Canadian winter weather and said, “Hey, don’t worry, it’ll be a piece of cake,” they may be wondering what eating cake has to do with switching to winter tires. Likewise, if you said instead that it’ll be “a walk in the park,” they would be confused about why they need to walk through a park to get their radials switched. Calling it a “cakewalk” wouldn’t help much, either. These expressions would be perfectly understood by anyone who has been conversing in English for years because they would have heard it many times before and used it themselves. In the case of using them around EAL (English as an additional language) speakers, however, you would be better off using the one word that these idioms translate as: *easy*. Again, the whole goal of communication is to be understood, so if you use idioms with people who haven’t yet learned them, you will fail to reach that goal. See www.theidioms.com for a wide selection of English idioms and their meanings.

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2.2.2: Considering Secondary Audiences

Always consider secondary or even tertiary audiences for any message you send because, besides secondary audiences you may invite, you have little-to-no control over what tertiary audiences see your message unless confidentiality can be somehow guaranteed. Your emails can be forwarded, your text or voicemail messages shown or played, and even what you say can simply be reported to tertiary audiences and be believed (depending on the credibility of the reporter). Youth who are more comfortable writing electronically than speaking in person often make the mistake of assuming privacy when sending messages and get burned when those messages fall into the wrong hands—sometimes with surprising legal consequences related to bullying or worse. Before sending that email or text, or leaving that voicemail in professional situations, however, always consider how it would go over with your manager, your family, or a jury.

You may think that you have a right to privacy in communication, and you do to some extent, but employers also have certain rights to monitor their employees and ensure company property (including cyber property) isn't being misused (Lublin, 2012, ¶14). If a disgruntled employee, for instance, uses their company email account in communication with a rival company to prove that they are part of a target company, then uses that email account to sell trade secrets before leaving for another job, the employer has a right to read those emails and take measures to protect against such corporate espionage. Because company emails can be stored on the organization's servers, always assume that any email you send using a company account can be retrieved and

read by tertiary audiences. If you are at all concerned that an email might hurt you if it fell into the wrong hands, arrange to talk to the primary audience in a channel that won't be so easily monitored.

Even in more harmless and routine information sharing, you must adjust your message for any known or unknown secondary audiences. If you CC (carbon copy) your manager or other interested stakeholders in any email, for instance, you will be more careful than you otherwise would be to ensure that your message is completely free of any language or content that would make you or them look bad. Your style will be a little more formal and you will proofread more thoroughly to avoid writing errors that make you appear uneducated and sloppy, which no employer wants to pay for.

Even if you don't yourself designate CC recipients, as explained above, someone else could. Say you're in a back-and-forth email thread with a co-worker as you collaborate on a project. You're making good progress at first, but your partner begins slacking off and your emails become progressively impatient, even angry and threatening. Frustrated, you enlist another collaborator who, towards the end of the thread as drafts are exchanged with finishing touches, CC's your manager to show that the work is completed. Seeing the lack of professionalism in your exchanges with the previous collaborator when trying to assess what discipline may be necessary, your manager now sees that you must share some of the blame for your poor communication choices.

Of course, netiquette requires that you be careful with whom you CC on messages. Often managers will be interested in what's going on with certain projects and would like to be CC'd to be kept in the loop. In such cases, clarify with them to what extent they want to see the progress; CC'ing them on every little exchange will just waste their time and annoy them by flooding their inbox. Involving them only when important milestones are met, however, will be much appreciated.

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2.2.3: Considering Your Relationship to the Audience and Their Position

Just as you might wear your best clothes for an important occasion like a job interview or wedding, you must respectfully elevate the formality of your language depending the perceived importance of the person you're communicating with. As said above, if you're writing to your manager about something very important, something that will be read closely perhaps by many people, you would be more careful to write in a professional style and fully proofread your email than you would if you were writing a co-worker who doesn't really care about the odd spelling mistake. Employers or clients are judgmental and will pigeonhole you as sloppy and careless about details if you send them a poorly written email, whereas all employers want to see that their employees are detail-oriented for the money they're paying them, especially if the employees' writing is representing the company to clients and other stakeholders (Wiens, 2012). Ultimately, you don't want to embarrass yourself and lose out on professional opportunities with glaring writing mistakes that more thorough proofreading could have caught.

Formality in writing requires correct grammar and punctuation, whereas more casual writing takes liberties such as using sentence fragments and contractions. If writing to a friendly co-worker a quick information-sharing email, for instance, you might say, "Just a quick heads-up: don't forget to submit your travel expenses to Brenda in HR by 4:30 today." The first clause is a noun-phrase fragment rather than an independent clause with a subject ("I ...") and predicate ("... am sending you ..."), it contains colloquialisms such as "heads-up" (meaning "forewarning" or "reminder"), the contraction "don't" shortens "do not," and the initials "HR" are shorthand for "the Human Resources department." Of course, your audience knows how to interpret all of this and will appreciate the conciseness of the message because it shaves seconds off the reading process, respecting their time. If you were the administrative assistant to an important manager, however, you may want to be more formal, courteous, correct, and yet still concise by saying "Please submit your travel expenses to Brenda in HR by 4:30pm today." Formality conveys respect.

Formality in writing also involves carefully selecting words that are slightly fancier than the colloquial ("informal") words you would normally use in everyday situations. Word choice is called "diction" and, if it requires that you use a thesaurus to find words with meanings equivalent to the simpler words that come to mind (called "synonyms"), then always use a dictionary to ensure that the synonym is the correct choice in the context you're using it. When writing a relatively non-judgmental co-worker whom you've become good friends with, you tend to write more casually with plain words that are possibly even slightly slangy for comic effect. When writing someone higher up in your organization's hierarchy, however, you would probably choose slightly fancier words along the formality spectrum, yet not so fancy as to come off as pretentious and trying to make them feel stupid by forcing them to look them up in the dictionary. Such obfuscation wouldn't be reader-friendly and accomplish the basic communication goal of being understood, as you might realize right now

if you don't know what the word *obfuscation* means (it means the act of intentionally making your meaning unclear to confuse your audience).

On most occasions, especially with customers, you want instead to strike a balance with a semi-formal style somewhere between overly formal and too casual. Your writing should read much like you talk in conversation, although it must be grammatically correct.

Table 2.2.3: Word Choices along the Formality Spectrum

Informal / Slang	Semi-formal / Common	Formal / Fancy
kick off	begin / start	commence
cut off	end	terminate
put off	delay	postpone
awesome / dope	good	positive
crappy / shoddy	bad	negative
flaunt	show	demonstrate
find out	discover	ascertain
go up	rise	increase
fess up / come clean	admit	confess
mull over	consider	contemplate
bad-mouth / put down	insult / belittle	denigrate
plus	also	moreover
jones for	need	require
put up with	endure / suffer	tolerate
leave out / skip	omit	exclude
give the go-ahead / greenlight	permit	authorize
loaded / well-heeled	wealthy / rich	affluent / monied
deal with	handle	manage
pronto / a.s.a.p.	now	immediately
muddy	confuse	obfuscate

2.2.4: Considering Your Audience's Level of

Knowledge

A key preparatory step whenever sharing information is to gauge approximately how much your audience knows about the topic you're writing about so that you provide no more and no less information than is necessary. This benefits both them and you. A safe assumption with everyone you deal with in professional situations is that they're busy and don't have time to read any more than they need to. If you over explain a topic in an email, you make the double mistake of wasting the reader's time and insulting them by presuming their ignorance. Besides getting on their bad side, this becomes a triple mistake considering the time *you* wasted in writing more than you had to.

On the other end of that spectrum, writing too little because you've incorrectly assumed that your audience knows what you know also inconveniences them and maybe puts you on their blacklist. A lack of necessary information in a message ultimately leads to either errors due to confusion or wasted time from having to respond with requests for clarification or, worse, damage control because your reader acted on misunderstandings resulting from your miscommunication; either way, the goal of communication (for the receiver to understand information as it was understood by the sender) isn't met by the message. If you email an older client describing a procedure for how to connect with you by video conference using a favourite online application but omit mention of your correspondent needing to download software from the application website prior to the conference call—a detail you just assumed everyone knows about web conferencing software as common as Skype—you not only cause costly delays, but you also make the client feel stupid and reluctant to deal with you for not being tech-savvy enough.

Appropriately gauging your audience's level of knowledge extends to the language you use. Every profession has its jargon, which is the specialized vocabulary, shorthand code words, and slang that you use amongst colleagues with the same discipline-specific education as you. Jargon saves time by making elaborate descriptions unnecessary, so it's useful among people who speak the same language. But some professionals err by using jargon with customers and even employers who don't know the lingo. At worst, this puts those audiences in the uncomfortable position of feeling ignorant of something perhaps they should know about, leading to confusion; at best it leads to opportunities for educating those audiences so they can use the same jargon with you. A legal professional, for instance, is necessary to help navigate someone through an unfamiliar court process and the bewildering legal terminology in documents related to it. But that professional must be able to translate that difficult legal language into familiar terms that the uninitiated can easily understand.

Besides using plain language, effective document design can also help aid understanding for those who may have difficulty with reading comprehension, as well as for those who are competent professionals but are just *busy*. When explaining a procedure, for instance, using a numbered list rather than a paragraph description helps the reader skim to find their spot when going back and forth between your instructions and performing the procedure itself. For instance, if you're explaining how to find the date of a webpage if one is not indicated on the page itself:

1. Go to google.com or place your cursor in the search bar of a Chrome browser tab.
2. Write “inurl:” in the search bar and paste the URL of the webpage you want the date for from “www.” onward.
3. Paste “&as_qdr=y15” at the end of the Google search URL.
4. Hit your Enter key and the date that the webpage was last updated will appear in grey on the third line of the first result.

is so much easier for your reader to follow than:

First, go to google.com or place your cursor in the search bar of a Chrome browser tab, write “inurl:” in the search bar, and paste the URL of the webpage you want the date for from “www.” onward. Next, paste “&as_qdr=y15” at the end of the Google search URL, then hit your Enter key. The date will appear in grey on the third line of the first result.

When the reader flips between the three browser tabs involved in this operation, the numbered list in one of them (perhaps an email tab) allows them to easily find where they left off when they go back to the email tab to follow the next step.

Brief, bolded headings and subheadings for discreet topics within a document also help orient readers looking for specific information, as you can see from scanning through this textbook. If this chapter contained no such headings and instead was just a ream of paragraphs like in a novel, finding this section using the Table of Contents and index alone would probably double or triple the time it takes to narrow down where it begins and ends. Again, if there are choices to be made and work to be done to make the reader’s job of understanding your meaning as you intend it easier, it’s on you to do that work. You don’t want them to miss vital information merely because you buried it as a common brick in a wall of text.

2.2.5: Considering Your Audience's Demographic

The previous subsection explained the necessity of gauging your audience’s level of education in a given subject area, and that extends to their more general level of education as well as other demographic factors such as age. Depending on your profession, you may have to deal with people of all ages and levels of education from elementary school children to world-wise retirees. A dental hygienist, for instance, adjusts their language from being simple with an overly enthusiastic, over-the-top friendly and reassuring tone with a child client in the dentist chair one moment, then switches in the next to using more technical vocabulary in a matter-of-fact yet still-friendly tone with an older client who has had years of dentist-chair lectures enough to know what “excessive plaque buildup at the gumline” means.

Sometimes judging levels of understanding can be difficult and lead to trouble when done in error, so tact and emotional intelligence is essential. Speaking to an elderly person as you would a child because you assume they’ve fallen into feeble-minded senility when they are indeed still sharp as a tack can be downright insulting

to them. Don't be surprised if your condescension is met with sassy kickback if you make that mistake. But if you speak to an elderly person as you would a middle-aged adult despite their having severe hearing loss and undiagnosed early-onset dementia, this will also lead to failures in communication and understanding. So, what are we to do, then?

The key to gauging the level of one's understanding if it could be either expert or clueless is always to begin communication with a mid-level diction and conversational tone in your opening message, then adjust based on the feedback message, which includes both a verbal or written response and nonverbals (if communicating in person). In person, nonverbal feedback such as a briefly furrowed brow of confusion helps to determine if a message has gone over the receiver's head even if they misleadingly say they understood just to save face. A slight eyeroll subtly informs you that you've started off too basic and need to jump up to a more advanced level. Sometimes you can even "see" these expressions in writing by reading between the lines of a response that indicates a more advanced understanding than you assumed.

If your correspondent's writing style similarly betrays a lack of education—for whatever reason—through numerous grammatical, spelling, and punctuation errors, then you know to adjust your own style to use more plain expressions accommodating someone with a more basic reading level. In such cases, be understanding rather than assume that the person is merely dim-witted. They could be:

- Extremely intelligent but English is their second or third language and they're still getting the hang of it
- Extremely intelligent at some things but just not at writing
- Very young and still learning how to write
- Very old and either out of practice or losing their faculties
- Functionally illiterate, as is the case with 2 out of 5 Canadian adults (Conference Board of Canada, 2013)
- Affected by any number of learning disabilities of varying severity
- Good writers and smart, but in a terrible rush

Unless you know otherwise, you can guess at any of the above explanations (or a combination of them) before responding, but never respond assuming one of them to be the case. Rather, respond without judgment to someone who writes poorly, but do so in a plain, accessible style using familiar words and fully explain your topic.

Being nonjudgmental as well as respectful towards those of different cultures and religious beliefs is also key to effective communication. If you are committed to a belief system yourself, never assume that everyone else shares your views or is wrong for believing otherwise. Even if you are not religious per se, you still have a belief system shaped by the culture in which you developed. Everyone's belief system is the result of life experiences that differ from those of others; unless that system drives them towards anti-social behaviour or even violence, nothing is wrong with holding those beliefs as far as you're concerned. The success of Canada's multicultural society depends on the tolerance and understanding between citizens. In your writing, always

be understanding towards others' beliefs; don't belittle or insult them. If someone writes you to say that they will be absent because of a Muslim holiday you had no idea about, for instance, use this as an opportunity to learn something about that holiday so you can say, for instance, "Eid Mubarak" at the end of your message to maintain goodwill.

Key Takeaways



Knowing your audience by their size, position relative to you, knowledge of your topic, and demographic helps you craft your message content and style to meet their needs.

Exercises



1. List at least three demographic traits that apply to you. How does belonging to these demographic groups influence your perceptions and priorities? Share your thoughts with your classmates.
2. Recall a time when you started a new job and learned the jargon of the workplace—words that the general public wouldn't know the meaning of, or at least the meanings you attached to them. Write a glossary listing as many such jargon words as you can along with their definitions (how you would explain them to the public). Share a few with the class. (If you've never been employed, use a volunteer, sports, or other group activity you've engaged in.)
3. Review the last email you wrote. Is it written formally or informally? If informal, revise it so that it is more formal as if you were to send it to a manager or client; if formal, revise it so that it is more informal as if you were to send it to a trusted co-worker. (If you want your most recent email to remain private, search back for one you wouldn't mind sharing. Include the original email in your submission.)

Reference

The Conference Board of Canada. (2013). *Adult literacy rate—low-level skills*. How Canada Performs. Retrieved from <http://www.conferenceboard.ca/hcp/details/education/adult-literacy-rate-low-skills.aspx>

2.3: SELECTING APPROPRIATE CHANNELS

Learning Objectives



4. Distinguish between communication channels to determine which is most appropriate for particular situations.

5. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Throughout this chapter we've been considering messages sent via email because it is the most common channel for written business messages. However, many professionals make the mistake of sending an email when another channel (e.g., a verbal rather than a written one) would be more appropriate for the situation and the audience. If you had to deal with inappropriate behaviour in the workplace, for instance, the right thing to do is discuss it in person with all involved because conflict resolution requires social intelligence informed by all the verbal and nonverbal information you can gather from them. You could follow up with an email summarizing a remedial action plan reached through constructive dialogue, but you would never deal with the situation by email alone.



Addressing sensitive situations exclusively by email (or, even worse, text message) tends only to intensify a conflict. Email or messaging can't possibly address the emotional complexity of a toxic situation and usually results in costly delays given the time lag between responses. Tensions also tend to escalate when people have the time to read too much into emails and text or instant messages about sensitive topics, misinterpret their tone, and write angry or passive-aggressive ones in return.

(Many people tend to lack filters when writing electronically in a state of heightened emotion because they feel relatively free to express the internal monologue that they would otherwise restrain if in the physical company

of the person they're writing to.) Recognizing that email is only one channel on a spectrum of other options, however, and that others would be more efficient in certain situations, can save plenty of hassle from knee-jerk reliance on one favoured or comfortable channel.

Between traditional and rapid electronic media, we have more choice for communication channels than ever in human history. Each has its own unique advantages and disadvantages that make it appropriate or inappropriate for specific situations. Knowing those pros and cons, summarized in Table 2.3 below for a dozen of the most common verbal and written channels available, is necessary for being an effective communicator in the modern workplace. Choosing channels wisely can mean the difference between a message that is received and understood as intended (the goal of communication), and one that is lost in the noise or misunderstood in costly ways.

Table 2.3: The Spectrum of Common Workplace Communication Channels

- In-person conversation and group meeting
- Email
- Instant / Text message
- Tweet
- Instagram
- Article, essay, or blog
- Letter
- Memo
- Report / PowerPoint
- Fax
- Phone, VoIP, voicemail, and conference calls
- Video chat and web conference

Channel: In-person conversation and group meeting

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none">• The most information-rich channel combining words and nonverbal messages• Dialogue facilitates immediate back-and-forth exchange of ideas• Maintains the human element lacking in most other channels• Additional participants can join for group discussion	<ul style="list-style-type: none">• Requires that speakers travel to be physically in the same space together• Some people are poor listeners and some are poor speakers• Impermanent unless recording equipment is used	<ul style="list-style-type: none">• Audience must be present and attentive rather than distracted by their mobile technology or multitasking• Use for genuine dialogue rather than monologue or shallow, superficial exchanges• A dynamic speaking ability is required to engage audiences	<ul style="list-style-type: none">• Quickly exchange ideas with people close by• Visually communicate to complement your words• Add the human element in discussing sensitive or confidential topics that need to be worked out through dialogue

Channel: Email

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Delivers messages instantly anywhere in the world to anyone with an internet connection and email address you have • Sends to one or many people at once, including secondary audiences CC'd or BCC'd • Allows you to attach documents up to several megabytes in size or links to any internet webpages • Allows for a back-and-forth thread on the topic in the subject line • Archives written correspondence for review even decades later • Can be done on any mobile device with an internet connection • Is free (beyond your subscription fees to an internet or phone provider) • Is somewhat permanent in that emails exist somewhere on a server even if deleted by both sender and receiver 	<ul style="list-style-type: none"> • Gives the illusion of privacy: your messages can be forwarded to anyone, monitored by your company or an outside security agency, retrieved with a warrant, or hacked even if both you and receiver delete them • Can be slow when used for back-and-forth dialogue • Tone may be misread (e.g., jokes misunderstood) due to the absence of nonverbal cues • May be sent automatically to the recipient's spam folder or otherwise overlooked or deleted without being read given the volume of emails some people get in a day • Subject to errors such as hitting "send" prematurely or replying to all when only the sender should be replied to • Subject to limits on document attachment size • Subject to spam (unsolicited emails) • Regretted emails can't be taken back or edited • Requires a working internet connection on a computing device, which isn't available everywhere in the world 	<ul style="list-style-type: none"> • Reply within 24 hours, or sooner if company policy requires it • Follow conventions for writing a clear subject line; salutation; message opening, body, and closing; closing salutation, and e-signature • Netiquette: be as kind as you should be in person; don't write emails angrily • Edit to ensure coverage of the subject indicated in the subject line with no more or less information than the recipient needs to do their job • Proofread to ensure correct grammar, punctuation, and spelling because errors compromise your credibility • Avoid confusion due to vagueness that requires that the recipient respond asking for clarification 	<ul style="list-style-type: none"> • Quickly deliver a message that doesn't need an immediate response • Send a message and receive a response in writing as evidence for future review (lay down a paper trail) • Use when confidentiality isn't necessary • Send electronic documents as attachments • Send the same message to several people at once, including perhaps people whose email address you need to hide from the others (using BCC) to respect their confidentiality

Channel: Instant/Text message

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Enables the rapid exchange of concise written messages • Can be done quietly so as to not be overheard • Inexpensive • Autocomplete feature helps achieve efficiencies in typing speed and spelling • Nonverbal characters such as emojis can clarify tone • Plenty of instant message applications are available, such as Facebook Messenger, Google Talk, WhatsApp, and SnapChat 	<ul style="list-style-type: none"> • Often used to avoid human contact when telephone or in-person communication is available and more appropriate • Encourages informality with lazy abbreviations, initialisms, and acronyms • Even with autocomplete, typing with thumbs alone can be slower than using 10 fingers on a desktop or laptop computer • Concise text alone can be misinterpreted for tone when used to summarize complex ideas • Other nonverbals such as emojis help clarify tone, but also undermine credibility if used in professional situations • Give the illusion of privacy: texts exist on servers and can be retrieved even if deleted by both sender and receiver • Mobility and portability of texting devices tempt users with poor impulse control to text dangerously while walking or driving, or rudely in front of people talking to them 	<ul style="list-style-type: none"> • Respond immediately or as soon as possible, since the choice to text or IM is usually for rapid exchange of information • Be patient if the recipient doesn't respond immediately; they may be busy with real-life tasks • Proofread when used for professional purposes as confusion due to writing errors can be costly when acted upon immediately • Use only when able; never text when driving because the distraction turns your vehicle into a lethal weapon; never text when walking because you get in people's way, hit obstacles yourself, and look like a slave to technology 	<ul style="list-style-type: none"> • Use for exchanging short messages quickly with someone physically distant • Get an information exchange in writing for reference later • Use when confidentiality isn't important

Channel: Tweet

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Able to reach a large audience of social media users for promotion using hashtags and by developing a following • Able to broadcast real-time updates accessible on smartphones • Able to send and reply to direct messages rapidly (like texting and instant messaging) • The 280-character limit (previously 140 before 2018) on tweets encourages conciseness • Able to link people to webpages for more information 	<ul style="list-style-type: none"> • The 280-character limit forces concision often leading to confusing initialisms, abbreviations, and word omission 	<ul style="list-style-type: none"> • Strike a balance in posting frequency—not too seldom, not too often • Be concise but also clear and grammatically correct • Maximize potential by using hashtags and links to usher readers towards further information 	<ul style="list-style-type: none"> • Broadcast information in real time to a broad range of users • Use when confidentiality isn't important

Channel: Instagram

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none">Instagram for Business provides branding visuals for interested customers, especially millennialsAllows customers to respond in real time	<ul style="list-style-type: none">The audience is largely limited to a younger demographic with limited spending powerMeans of expression is limited to photos and brief captionsCan undermine professional credibility if used for selfies, which make you appear juvenile and overly self-involvedInconvenient if posting and managing an account from a laptop or desktop computer rather than a smartphoneDoesn't provide an easy way to link to a company website to provide audiences with further informationContributes to a platform seen to be the worst for mental health (Royal Society for Public Health, 2017)	<ul style="list-style-type: none">Use for providing visuals of company products or services rather than for individual self-promotion with selfiesStrike a balance in posting frequency—not too seldom, not too oftenInclude as part of a marketing mix that includes other social media such as Facebook and Twitter	<ul style="list-style-type: none">Post company photos to reach younger demographics

Channel: Article, essay, or blog

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Able to write at length about any topic and reach a potentially large online audience as a blog or article published in an online media outlet • Can allow dialogue if a comments section is enabled below if posted online 	<ul style="list-style-type: none"> • Tend to be monologues without the possibility of feedback • People with short attention spans tend to avoid large chunks of text • Some tend to be wary of blogs because they are a genre overpopulated by people's ill-formed opinions 	<ul style="list-style-type: none"> • Organize with a clear topic thesis and support it with a logical flow of convincing arguments built around credible evidence • Edit and proofread to ensure correctness, conciseness, and reader-friendly flow • Enable comments for feedback and dialogue 	<ul style="list-style-type: none"> • Articulate thoughts on topics that require lengthy development

Channel: Letter

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Shows respect through formality and effort • Ensures confidentiality when sealed in an envelope and delivered to the recipient's physical address (it is illegal to open someone else's mail) • Can introduce other physical documents (enclosures) 	<ul style="list-style-type: none"> • Slow to arrive at the recipient's address depending on how far away they are from the sender • Can be intercepted or tampered with in transit (albeit illegally) • Can be overlooked as junk mail • Time consuming to print, sign, seal, and send for delivery • Mail postage is costlier than email 	<ul style="list-style-type: none"> • Follow conventions for different types of letters (e.g., block for company letters, modified block for personal letters) and providing the sender's and recipient's address, date, recipient salutation, closing salutation, and author's signature • Use company letterhead template when writing on behalf of your organization 	<ul style="list-style-type: none"> • For providing a formal, permanent, confidential written message to a single important person or organization • Ideal for job applications (cover letter), persuasive messages (e.g., fundraising campaigns), bad-news messages, matters with possible legal implications (e.g., claims), and responses to letters • For non-urgent matters

Channel: Memo

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> Provides a written record of group decisions, announcements, policies, and procedures within an organization Can also be a format for delivering small reports (e.g., conference report) and recording negotiating terms in agreements between organizations (e.g., memo of understanding) Can be posted on a physical bulletin board and/or emailed 	<ul style="list-style-type: none"> Requires a good archiving system to make memos easily accessible for those (especially new employees) needing to review a record of company policies, procedures, etc. 	<ul style="list-style-type: none"> Use template with company letterhead Follow the same conventions as email, except omit the opening and closing salutations and e-signature 	<ul style="list-style-type: none"> For a written record for decisions, announcements, policies, procedures, and small reports shared within an organization Post a printed version on an office bulletin board and email to all involved

Channel: Report / PowerPoint

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> Allows presentation of a high volume of information presenting research and analysis Can take various forms such a document booklet or proposal for reading alone or PowerPoint for presenting 	<ul style="list-style-type: none"> Time-consuming to write with proper research documentation and visual content, as well as to prepare for (presentations) Time-consuming for the busy professional to read or an audience to take in Presentations can bore audiences if not engaging 	<ul style="list-style-type: none"> Follow conventions for organizing information according to the size of the report, audience, and purpose Augment with visuals Engage audiences with effective oral delivery and visual appeal 	<ul style="list-style-type: none"> For providing thorough business intelligence on topics important to an organization's operation For internal or external audiences For persuading audiences with well-developed arguments (e.g., proposal reports)

Channel: Fax

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Fast delivery of letters and forms • Allows the use of company letterhead 	<ul style="list-style-type: none"> • Limited to 8.5×11” formats • Expensive for the purchase of fax machines and paper rolls that need regular replacing • Possibly expensive if long-distance phone charges apply • Few people use fax and a dwindling number of businesses still use them 	<ul style="list-style-type: none"> • Keep it short • Use only if required in an industry that still favours fax 	<ul style="list-style-type: none"> • For sending forms or work orders in industries that still use fax (e.g., health care)

Channel: Phone, VoIP, voicemail, and conference calls

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Enables audio-only dialogue between speakers anywhere in the world • Quick back-and-forth saves time compared to written dialogue by email or text • Can send one-way voicemail messages or leave them when the recipient isn't available • Can be conducted cheaply over the internet (with Voice over Internet Protocol) and easily on smartphones • Specialized phone equipment and VoIP enable conference calls among multiple users 	<ul style="list-style-type: none"> • Absence of nonverbal visual cues can make dialogue occasionally difficult • The receiver of a call isn't always available, so the timing must be right on both ends; if not, availability problems lead to "phone tag" • Time zone differences complicate the timing of long-distance calls • Possibly expensive for long-distance calls over a public switched telephone network (PSTN) if VoIP isn't available • Not always clear how long you have to leave a voicemail message, running the risk of being cut off if your message runs too long • Recording of conversations is typically unavailable unless you have special equipment 	<ul style="list-style-type: none"> • Follow conventions for initiating and ending audio-only conversation • For voicemail, strike a balance between brevity and providing a thorough description of the reason for the call and your contact information • Record a professional call-back message for voicemail when not available to take a call • Respond to voicemail as soon as possible since you were called with the hope that you would be available to talk immediately • Be careful with confidential information over the phone, and don't discuss confidential information via voicemail 	<ul style="list-style-type: none"> • For when quick dialogue is necessary between speakers physically distant from one another • Conference call when members of a team can't be physically present for a meeting • Use VoIP to avoid long-distance charges • Leave clear voicemail messages when receivers aren't available • When a record of the conversation isn't necessary • When confidentiality is somewhat important

Channel: Video chat and web conference

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> Enables face-to-face one-on-one or group meetings for people physically distant from one another (anywhere from across town to the other side of the planet) Allows participants to see nonverbals that would be unseen in a phone conference meeting Can be integrated into a real in-person meeting to include physically absent members Inexpensive with common applications such as Skype, FaceTime (for Apple devices), and Google Talk Cheaper than flying people around to conduct routine meetings 	<ul style="list-style-type: none"> Connection problems often result in poor audio quality (cutting in and out) and split-second delays that result in misleading nonverbal cues and participants talking over one another Enterprise applications improve functionality but for a cost 	<ul style="list-style-type: none"> Requires a high-speed internet connection, microphone, and webcam all in good working order Requires that participants be as present and presentable (at least from the waist-up) as they would be for an in-person meeting Participants must control their background surroundings, especially when web conferencing from home, to avoid interruptions 	<ul style="list-style-type: none"> For when in-person meetings are necessary but participants are in different physical locations Often used for job interviews when participants cannot conveniently attend in person

Choosing the correct communication channel on the spectrum of options using the criteria above involves a decision-making process based on the purposes of the communication, as discussed earlier in this chapter. Factors to consider include convenience for both the sender and receiver, timeliness, and cost in terms of both time and money. When choosing to send an email, for instance, you:

1. Begin with the thought you need to communicate
2. Decide that it must be in writing for future reference rather than spoken
3. Consider that it would be more convenient if it arrived cheaply the instant you finished writing it and hit Send
4. Want to give the recipient the opportunity to respond quickly or at least within the 24-hour norm
5. Decide that it would be better to send your message by email rather than by other electronic channels such as text, instant message (because you have more to say than would fit in either of those formats), or

fax because you know the recipient prefers email over fax, as do most people and all but a few professional fields.

All of these decisions may occur to you in the span of a second or so because they are largely habitual. Figure 2.3 charts out that decision-making process for selecting the most appropriate channel among the 12 given in Table 2.3 above.

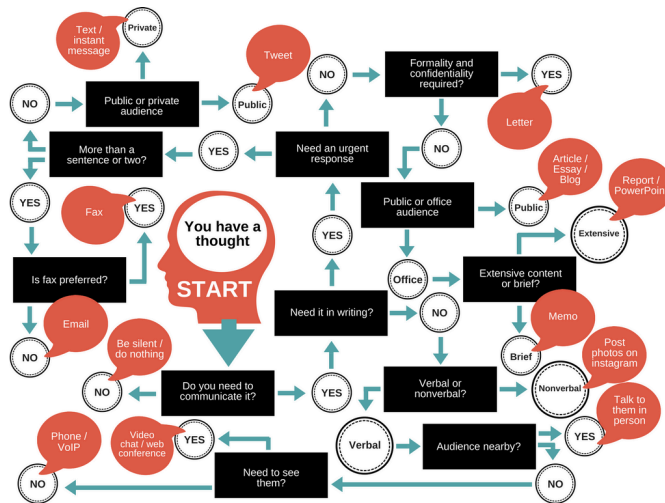


Figure 2.3: Channel Selection Process Flow Chart

[Click here for an interactive and accessible version of the Channel Selection Flow Chart](#)

We will examine the uses, misuses, conventions, and implications of these channels in the chapters ahead, especially Chapters 6-7 on written documents in Unit 2 and Chapters 10-11 on oral communication in Unit 3. For now, however, let's appreciate that

choosing the right channel at the outset of the writing process saves time—the time that you would otherwise spend correcting communication errors and doing damage control for having chosen the wrong one for the situation at hand. If you find yourself forced to meet someone in person to deal with the damage wrought by a toxic email exchange before moving forward, just think how you would be into the next steps if you had skipped the email war and met in person to deal with the situation like adults in the first place.

Key Takeaway



Choose the most appropriate communication channel for the occasion by taking into account the full spectrum of traditional and electronic means, as well as your own and your audience's needs.

Exercises



Identify the most appropriate channel for communicating what's necessary in the given situation and explain your reasoning.

1. You come up with a new procedure that makes a routine task in your role in the organization quicker and easier; praise for your innovation goes all the way up to the CEO, who now wants you to meet with the other employees in your role in the seven other branch offices across the country to share the procedure.
2. A customer emails you for a price quote on a custom job they would like you to do for them. (Your company has a formal process for writing up quotes on an electronic form that gives a price breakdown on a PDF.)
3. You are working with two officemates on a market report. Both have been bad lately about submitting their work on time and you're starting to worry about meeting the next major milestone a few days from now. Neither has been absent because you can see them in their offices as you walk by in the hallway.
4. You are about to close a deal but need quick authorization from your manager across town about a certain discount you would like to apply. You need it in writing just in case your manager forgets about the authorization or anyone else questions it back at the office.
5. Your division recently received word from management that changes to local bylaws mean that a common procurement procedure will have to be slightly altered when dealing with suppliers. Your team meets to go over the changes and the new procedure, but you need to set it down in writing so that everyone in attendance can refer to it, as well as any new hires.
6. You have a limited amount of time to discuss a potential funding opportunity with a colleague in another city because the proposal deadline is later in the week and it's almost closing time in your colleague's office. You'll have to hammer out some details about who will write the various parts of the proposal before you get to work on it tonight.
7. You were under contract with a local entrepreneur to perform major landscaping services. Near the end of the job, you discovered that he dissolved his company and is moving on, but you haven't yet been paid for services rendered. You want to formally inform him of the charges and remind him of his contractual obligations; in doing so you want to lay down a paper trail in case you need to take him to court for breach of contract.

Reference

Royal Society for Public Health. (2017, May 19). *Instagram ranked worst for young people's mental health*. Retrieved from <https://www.rsph.org.uk/about-us/news/instagram-ranked-worst-for-young-people-s-mental-health.html>

CHAPTER 3: THE WRITING PROCESS II: RESEARCHING

Jordan Smith

Chapter Learning Objectives

1. Determine the appropriate research methodology that meets the needs of the audience.
2. Distinguish between formal and informal research.
3. Quote source text directly with accuracy and correct punctuation.
4. Use effective reading strategies to collect and reframe information from a variety of written materials accurately.
5. Locate, select, and organize relevant and accurate information drawn from a variety of sources appropriate to the task.
6. Integrate and document information using commonly accepted citation guidelines.

Once you've identified your purpose for writing, profiled your audience, and selected the appropriate channel (Stage 1 in the writing process covered in Ch. 2 above), next you must gather the information that your audience needs. From the shortest informative email to the sprawling analytical report, most professional messages involve relaying information that was looked up—that is, they involve research. Employers value employees who are resourceful, whose research skills go well beyond Google-searching on the internet and focusing on the top few results like anyone can do. Whether such in-demand employees get the needed information from a print book in a library, a manual from a database on a company intranet, an article from a subscription database on the internet, or simply by asking a reputable authority such as a veteran co-worker, they prove their value by knowing where to find valuable information, how to use it appropriately, and how to document it if necessary.

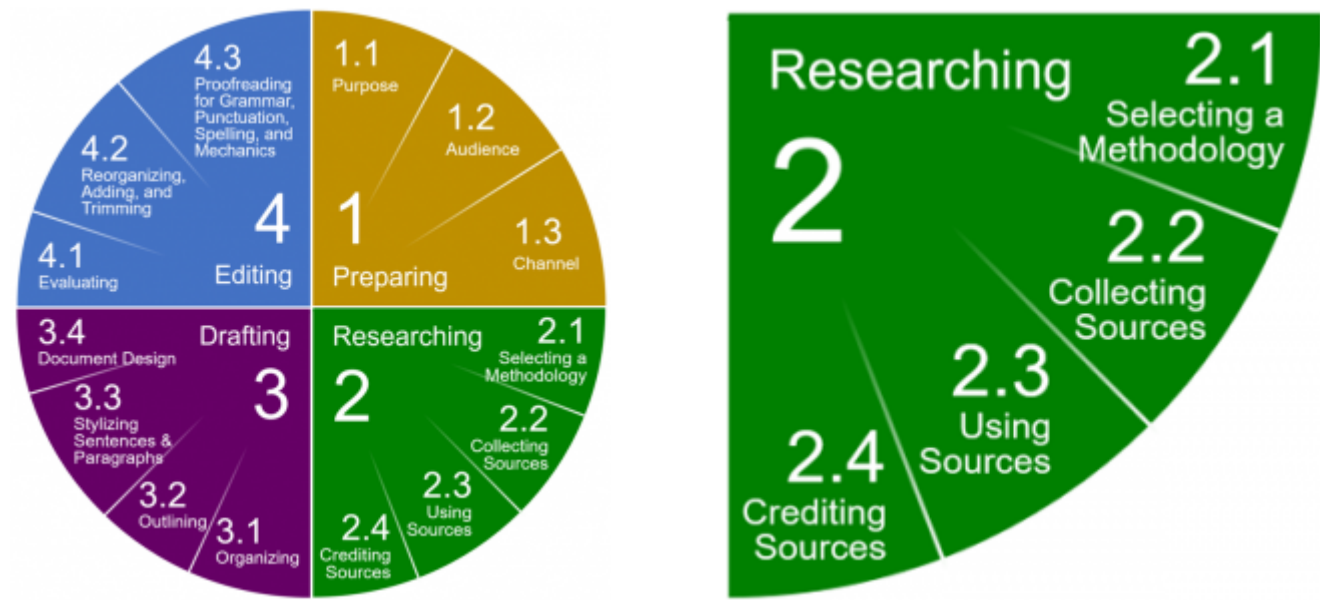


Figure 3: The four-stage writing process and Stage 2 breakdown

- 3.1: Choosing a Research Methodology
- 3.2: Locating Credible Sources
- 3.3: Collecting Sources by Reading with a Purpose
- 3.4: Using Source Text: Quoting, Paraphrasing, and Summarizing
- 3.5: Documenting Sources in APA, MLA, or IEEE Styles

3.1: CHOOSING A RESEARCH METHODOLOGY

Learning Objectives



1. Determine the appropriate research methodology that meets the needs of the audience.
2. Distinguish between formal and informal research.
5. Locate, select, and organize relevant and accurate information drawn from a variety of sources appropriate to the task.

The first step in research is to know what the situation calls for in terms of the formality or rigour of research required. Although formal research carefully documents sources with citations and references, most messages relay informal research such as when you quickly look up some information you have access to and email it to the person who requested it. Either way, you apply skills in retrieving and delivering the needed information to meet your audience's needs, often by paraphrasing or summarizing, which are extremely valuable skills coveted by employers. Knowing what research type or “methodology” the situation calls for—formal or informal research, or primary or secondary research—in the first place will keep you on track in this still-preliminary stage of the writing process.

The research methodology where you look up information and deliver the goods in an email answering someone's question without needing to formally cite your sources is **informal research**. It is by far the most common type of research because any professional does it several times a day in their routine communication with the various audiences they serve. Say your manager emails asking you to recommend a new printer to replace the one that's dying. You're no expert on printers but you know who to ask. You go to Erika, the admin. assistant in your previous department, and she says to definitely go with the Ricoh printer. You trust what she says, so you end your research there and pass along this recommendation to your manager. Now, because your source for the information, whom you don't necessarily need to identify in informal research, was relatively subjective and didn't explain in full why the Ricoh was better than all the other models available, you can't

really have 100% confidence in the recommendation you pass along. This type of research will do in a pinch when you're short on time and your audience doesn't need to check your sources.

Formal research, on the other hand, takes a more systematic approach and documents the sources of information compiled using a conventional citation and reference system designed to make it easy for the audience to check out your sources themselves to verify their credibility. Formal research is more scientific in discovering needed information or solving a problem, beginning with a hypothesis (your main idea when you begin, which, in the case above, could be that the Ricoh *might* be the best printer), and then testing that hypothesis in a rigorous way. In this case you would come up with a set of criteria including certain features and capabilities that you need your printer to have, cost, warranty and service plan, availability, etc. Next you would look at all the accessible literature on the printers available to you, including the product webpages and spec manuals, customer reviews from other vendors, and reviews from reputable sources such as *Consumer Reports*, which gets experts to test the various available models against a set of criteria. Finally, you could test the printers yourself, score them according to your assessment criteria, rank the best to worst, and report the results.

Formal research obviously requires more time, labour, practice, skill, and resources in following a rigorous procedure. In the case of the printer research above, having a subscription to *Consumer Reports* gives you access to valuable information that not everyone has. (If you simply Google-searched “best office printer,” you may get a *Consumer Reports* ranking as one of your top results, but when you follow the links, you'll get to a subscription pricing page rather than the list you're looking for. A large part of the internet exists on the other side of paywalls.) If you're a college student, however, you can access *Consumer Reports* via your college library account if its journal and magazine databases include *Consumer Reports*, search for office printers, and get a handy ranking of the latest multifunctional printers for the modern office. You check out their selection criteria and determine that their number-one choice is the right printer for your needs, so you respond to your manager with the make and model number. Finally, to prove that the recommendation comes from a reputable authority, you cite the *Consumer Reports* article showing the author, year, title, and retrieval information so that your manager can verify that you used a reputable, current source.

But why go to so much trouble? Why not just look briefly at all the options and follow your gut? Well, your gut isn't much help when you're in over your head. If you're going to spend a few thousand dollars on the best printer, you're going to want to do it right. You don't want to waste money on one that has several problems that you could have known about beforehand had you done your homework. In this case, formal research (“homework”) protects you against preventable losses.

Like formal *vs.* informal research, primary *vs.* secondary has much to do with the level of rigor. Basically, **primary research** generates new knowledge and secondary research applies it. In the above case, the authors of the *Consumer Reports* article conducted primary research because they came up with the assessment criteria, arranged for access to all the printers, tested and scored each according to how well they performed against each criterion, analyzed the data, determined the ranking of best to worst printer on the market, and reported it in

a published article. If you can't conduct primary research yourself because you don't have easy access to all the printers worth considering, you are thankful someone else has and would even pay money for that intel.

Other forms of primary research include surveys of randomly sampled people to gauge general attitudes on certain subjects and lab experiments that follow the scientific method. If a pharmaceutical company is researching a new treatment option for a particular health condition, for instance, it starts in the chemistry lab producing a compound that could be put in a pill, tests its safety on animal subjects, then runs human trials where it's given to as many test subjects as possible. Some are given a placebo without knowing it (making them "blind") by someone on the research team who also doesn't know whether it's the real pill or the placebo (making the study "double blind"). Close observations of the effects on people with the condition and without, having taken the new pill and the placebo, determines whether the new drug is actually effective and safe. Primary research is labour-intensive, typically expensive, and may include aspects of secondary research if referring to previous primary research.

Secondary research is what most people—especially students—do when they have academic or professional tasks because it involves finding and using primary research. To use the printer example above, accessing the *Consumer Reports* article and using its recommendation to make a case for office printer selection was secondary research. Depending on whether that secondary research is informal or formal, it may or may not cite and reference sources.

The easiest, most common, and most expedient research, the kind that the vast majority of informative workplace communication involves, is **informal secondary research**. As when an employee sends company pricing and scheduling information in response to a request from a potential customer, informal secondary research involves quickly retrieving and relaying information without citing it—not out of laziness or intentional plagiarism, but because formal citations are neither necessary nor even expected by the audience. When you do a school research assignment requiring you to document your sources, however, and if your manager requires you to cite the sources you used as a basis for endorsing an office printer in a recommendation report (because it will be an expensive investment), for example, you perform **formal secondary research**. In business, the latter type is best for ensuring that company resources are used appropriately and can be supported by all stakeholders. In other words, formal secondary research is a necessary part of a business's due diligence. In the following section (§3.2), we will break down the labour-intensive process of building a document around source material collected through formal secondary research.

Key Takeaway



Determine the most appropriate research methodology—informal or formal, primary or secondary—for your audience and purpose depending on the level of rigour required.

Exercise



1. Use your college library account to access *Consumer Reports* and find a report on a product type of interest to you. Assuming that your audience's needs are for informal secondary research only, write a mock (pretend) email making a recommendation based on the report's endorsement.
2. Now, for the sake of comparing sources, search for recommendation information on the same product type just by Googling it. What are the top search results? Going down the results list, did you find any unbiased sources that you could use in your recommendation email? What makes these sources biased or unbiased?

3.2: LOCATING CREDIBLE SOURCES

Learning Objectives



5. Locate, select, and organize relevant and accurate information drawn from a variety of sources appropriate to the task.

Once you’ve selected the appropriate research methodology, your next task is to search for sources that can be taken seriously by your audiences and, in so doing, narrow down your topic. Research is largely a process of sorting out the wheat from the chaff, then processing that wheat into a wholesome product people will buy and digest. Appropriately using credible sources reflects well on your own credibility, whereas using suspicious sources—perhaps because they were the top results of a Google-search filtered by an algorithm informed by your search history, which may show that you haven’t been much concerned with quality sources—undermines your own authority.

A research document full of dubious sources makes you look uneducated, lazy, flakey, or gullible at best, or at worst conniving and deceptive. We’re in an age that some have dubbed the “post-truth era” where “fake news” churned out by clickbait-driven edutainment outlets can be a major determining factor in the course of history (White, 2017). Building the critical-thinking skills to distinguish truth from lies, good ideas from bad, facts from propaganda, objective viewpoints from spin, and credible sources from dubious ones is not only an academic or civic duty but also key to our collective survival. Learning how to navigate these perilous waters is one of the most important skills we can learn in school.

College or public libraries and their online databases are excellent places to find quality sources, and you should familiarize yourself with their features such as subject guides and advanced search filters. Even libraries are populated by sources outside the realm of respectability, however, because they cater to diverse stakeholders and interests by being comprehensive, including entertainment materials in their collections. They also have holdings that are horribly out of date and only of historical interest. Whether in the library or on the open internet, the only real way to ensure that a source is worth using is to develop critical thinking skills in knowing what to look for in sorting the wheat from the chaff.

- 3.2.1: Assessing the Credibility of Print Sources
- 3.2.2: Assessing the Credibility of Online Sources

3.2.1: Assessing the Credibility of Print Sources

Developing a good sense of what sources are trustworthy takes time, often through seeing patterns of approval in how diligent professionals rely on certain sources for credible information. If you continue to see respected professionals cite articles in *Scientific American* and *The Economist*, for instance, you can be reasonably assured of those sources' credibility. If you see few or no professionals cite *Popular Mechanics* or *Infowars* and you also see non-professionals cite fantastic, sensational, or shocking stories from them in social media, you have good reason to suspect their reliability. The same goes for sources regarding certain issues; if 97% of relevant scientists confirm that global climate change results from human activity (Cook et al., 2016), for instance, sources representing or championing the 3% opposition will be seen as lacking credibility. Patterns of source approval take time to track, but you can count on many more immediate ways of assessing credibility in the meantime.

The following indicators are worth considering when assessing print sources (and some online sources, but we will deal with them separately after) because they usually all align in credible sources:

- **Author credentials:** If the author is identified by name and credentials, you can verify whether they are expert enough on the topic to be a credible authority.
 - Generally, the higher the credential or industry position an author holds, the more credible you can expect them to be. An author with a PhD (doctoral credential) in psychology will be a credible authority on matters of psychology because they have legitimate expertise. A talk-show host, on the other hand, lacks credibility and expertise on such topics since they don't have the same years of focused study, training, and clinical practice in the field. The PhD is a more advanced credential than a master's degree, which is more advanced than an undergrad (four-year bachelor's) degree, which is more advanced than a college diploma or certificate, which is more advanced than a high school diploma. In the absence of more detailed information, you can roughly gauge how credible an authority someone is on a topic based on where they fall on that spectrum of education.
 - Years of successful industry experience is also a trustworthy credential. If the author of a trade journal article has 35 years of experience in the industry, 20 of those as an owner of a thriving business, you can expect expert knowledge from them if their topic is on matters directly related to their profession.
 - Likewise, a blogger can only be taken seriously if they are a working professional writing about their work and shouldn't be relied on outside of their area of expertise.
 - A blogging hobbyist might have some interesting things to say, but without expert training and

credentials, their word doesn't carry much weight. If a backyard astronomer discovers something major in the night sky, for instance, it takes verification and systematic cataloguing from credentialed astronomers employed by renowned institutions before the discovery is considered real.

- **Currency:** Depending on the topic, how recently the source was published can be a key indicator of credibility.
 - A book on communications technology from 1959 is no longer a relevant authority on communications because technology has changed so much since then. A 1959 writing guide such as Strunk and White's *Elements of Style*, however, is mostly still relevant because we still value its advice on writing concisely and because language hasn't changed drastically since then. (More recent editions have dispensed with outdated advice like using masculine pronouns exclusively when referring to writers, however, since we now value writing that's not gender-exclusive, as discussed in §2.2.1 above).
 - In technology fields generally, a source may be considered current if it was published in the past 5-10 years; in some sub-disciplines, especially in computing, currency may be reduced to more like 1-2 years depending on how fast the technology is advancing. Disciplines that advance at a slower pace may have major sources still current even after 15-20 years because nothing has since come along to replace them.
- **Author objectivity:** If the author argues entirely on one side of a debate on which experts disagree, be suspicious of the source's credibility.
 - If the author identifies the other sides of a debate and convincingly challenges them with strong evidence and sound reasoning, then their work is worth considering.
 - If the author ignores the controversy altogether, summarily dismisses alternative points of view out of hand, offers dubious arguments driven by logical fallacies, simplifies complex issues by washing out any nuance, or appears to be driven more by profit motive than dedication to the truth, then "buyer beware." Using such an extremely slanted source will undermine your own credibility.
 - Company websites, especially for smaller businesses, are generally suspect because their main goal is to attract customers and ultimately profit, so they're not going to focus too much on information that may give potential customers reason to think twice no matter how legitimate it is. A home security alarm company, for instance, is probably not going to post crime statistics in an area that has record-low criminal activity because people will conclude that home security is a non-issue and therefore not worth spending money on. The company is more likely to sidestep rational appeal and prey instead on fears and anxieties by dramatizing scenarios in which your home and loved-ones are violated by criminals. If the company website focuses on education, however, by explaining what to look for to assess the credibility of the professional you're seeking, then you are

probably looking at a successful operation that does quality work and doesn't need to fleece you in order to survive.

- **Publisher quality:** If the source publisher is an established, long-running, big-city (e.g., New York or Toronto) or university press with a large catalogue, you can be reasonably assured that the source underwent an editorial process that helped improve its validity.
 - Run a quick background check on the publisher by looking up their website and some other sources on them such as the *Wikipedia* articles via its List of English-language book publishing companies (2018) and List of university presses (2018). Since this is quick, informal secondary research, you need not document this research unless you were writing a report specifically on their credibility.
 - An editorial process means that more people besides the author reviewed the work for quality assurance prior to publishing.
 - A self-published (“vanity press”) book lacking that constructive criticism, however, wouldn't necessarily have had the benefit of other people moderating the author's ideas and pushing them towards expert consensus.
 - If the publisher isn't a university press or operates outside of the expensive New York City zip code, however, that's not necessarily a guarantee that it lacks credibility, but you may want to do a background check to ensure that it's not a publisher with a catalog of, say, white-supremacist, conspiracy theorist, or climate change-denying literature. Likewise, if you see that the source is sponsored and/or promoted by special interests like Big Oil or a far-left extremist group, for instance, your suspicions should be raised about the validity of the content.
 - See Cornell University Library's Distinguishing Scholarly from Non-Scholarly Periodicals: A Checklist of Criteria (2017).
- **Peer review:** Any source that undergoes the peer-review process requires the author to make changes suggested by credentialed experts in the field called upon by the publisher. This process ensures that author errors are corrected before the text is published and hence improves both its quality and credibility.
- **Writing quality:** The quality of the writing is another indicator of credibility because it also suggests that the source underwent an editorial process to ensure quality and respectability.
 - A poorly written document, on the other hand, suggests that the author was alone and isn't a strong enough writer to proofread on their own, or that no one involved in its publication was educated enough or cared enough about details to bother correcting writing errors.
 - Consider the connection between the quality of one's writing with the quality of their thinking. If your writing is organized and well structured, abides by accepted conventions, and is error-free, your thinking tends towards all such qualities too. If someone's writing is a mess and rife with errors, on the other hand, it often betrays a scattered and careless mind.

- Notice that quality publications will have very few if any writing errors.
- **References:** If a source identifies its sources and all of them meet the credibility standards outlined above, then you can be reasonably certain that the effort the source author made towards formal secondary research ensures their credibility.
 - If the source doesn't identify sources, however, or is vague about them (e.g., with expressions like "research shows that ...," "studies have proven that ...," or "experts say that ..."), then you should question why the author hasn't bothered to cite those research studies or name those experts. Of course, it may be because they don't have the time and space to cite sources properly in the platform they're writing. But it may also be because they're lazy in their research or because they're making it up for self-serving purposes.

3.2.2: Assessing the Credibility of Online Sources

Online sources pose special challenges to students and professionals conducting research, since most will expediently conduct research entirely online where some of the above indicators of credibility must be rethought a little. Sometimes the author isn't revealed on a webpage, perhaps because it's a company or organization's website, in which case your scrutiny shifts to the organization, its potential biases, and its agenda. A research project on electronic surveillance, for instance, might turn up the websites of companies selling monitoring systems, in which case you must be wary of any facts or statistics (especially uncited ones, but even cited sources) they use because they will likely be cherry-picked to help sell products and services. And instead of checking the publisher as you would for a print source, you could consider the domain name; websites with .edu or .gov URL endings usually have higher standards of credibility for the information they publish than sites ending with .com or .org, which are typically the province of commercial enterprises (as in the monitoring systems example above) and special interest groups with unique agendas.

Although successful in being a comprehensive repository of knowledge, *Wikipedia.org*, for instance, is not generally considered credible and should therefore not appear as a source in a research document unless it's for a topic so new or niche that no other credible sources for it exist. By the organization's own admission, "*Wikipedia* cannot guarantee the validity of the information found [on their site]." The Web 2.0, user-generated nature of *Wikipedia* means that its articles are susceptible to vandalism or content changes inconsistent with expert opinion, and they aren't improved by any formal peer-review process (Wikipedia, 2015). *Wikipedia* sacrifices credibility for comprehensiveness. For these reasons, a *Wikipedia* article in a research report is a little laughable; few will take you seriously if they see it there because you will look lazy for stopping at the first available source and picking the lowest-hanging fruit.

A *Wikipedia* article can be a good place to start in a research task, however. If you're approaching a topic for the first time, use *Wikipedia* for a general introduction and a sense of the topic's scope and key subtopics.

(*Wikimedia Commons* is also a reliable source of images provided you credit them properly.) But if you're going to cite any sources, don't stop there; use the credible ones that the *Wikipedia* article cites by scrolling down to the References section, checking them out, and assessing them for their credibility using the criteria outlined above in §3.2.1.

A final indicator of credibility for online sources, similar to the writing-quality check discussed above, is the overall design quality of the website. The attractiveness of a site may be subjective, but a user-friendly and modern design suggests that money was spent relatively recently on improving its quality. If the site looks like it was designed 10-15 years ago and hasn't had a facelift since, you can suspect that it's lost its currency. Some websites look dated despite their content still being relevant, however, because that content doesn't change drastically over time. Like Strunk and White's *Elements of Style* mentioned above, sites such as The Mayfield Handbook of Technical & Scientific Writing can still prove useful as free writing guides despite looking like they were designed when most of their current student users were in diapers.

Key Takeaway



Investigating and narrowing down a research topic involves using databases to locate reputable sources using criteria to assess for credibility such as the quality of the source author, writing, references, and publisher.

Exercises



1. Choose a research topic based on an aspect of your professional field that piqued your attention in your other courses in the program. Assemble credible sources using a rubric that ranks each relevant source based on the assessment criteria explained in §3.2.1 above (e.g., the criterion for the first line of the rubric may be Author Credibility, which you can score out of 10, with 10 being a bona fide expert in their field and 0 being a dilettante with no experience; the second may be Currency, with 10 points going to a source published last year and 0 for something a century or more

out of date, etc.). With each score for each source, give a brief explanation for why you scored it as you did.

2. Consider a recent controversy in the news that all news outlets have covered. Assemble articles from a variety of outlets throughout Canada, the United States, and even internationally, including those with major audience share like the CBC, CNN, FoxNews, and the Guardian, as well as some on the fringe. First compare the articles to identify the information that's common to them all, then contrast them to identify the information and analysis that distinguishes them from one another. What conclusions can you draw about how bias factors into the reportage of world events?

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3.3: COLLECTING SOURCES BY READING WITH A PURPOSE

Learning Objectives



4. Use effective reading strategies to collect and reframe information from a variety of written materials accurately.

Part of the process of identifying credible sources involves reading critically to find the best information available for your purposes, and those are whatever you've determined your audience's needs to be. When collecting sources online by entering key terms into a search engine, examining the list of titles, and clicking on those that seem relevant, you begin the process of narrowing down your topic by what research materials are available. Of course, you don't have time to read *all* the thousands or even millions of webpages and articles that turn up in Google search results to determine which fulfill your (and your audience's) purposes. You skim.

Successful skim-reading depends on the effective organization of the sources you're sorting through as well as your own time-management strategies. For articles, you would focus on the abstract or synopsis—a paragraph that summarizes the entire piece and helps determine if it's what you're looking for. For webpages, you would read the very top and then skip down to see if the section headings indicate topics of interest; you can also do a word search (ctrl + f) if you're scanning for specific concepts. At the level of each paragraph, you rely on the first sentences representing the topic of the paragraph (see §4.7 below for more on paragraph organization) so that you can skim the topic sentences, and perhaps the concluding sentences, to capture the main points and get a sense of how the content flows (Freedman, 2012). Bolded key words and illustrations also help. (If your sources are effectively organized in this fashion, you can express your gratitude by paying it forward to your own readers. Organize your own writing so that you place main points strategically in topic sentences and highlight topics as subheadings. Your readers will be grateful if you help them to skim effectively.)

When you find online sources relevant to your topic, best practice for preparing to document and use them properly is to collect them in an informal annotated bibliography. A formal **annotated bibliography** lists

full bibliographical entries (see §3.5 below) and a proper summary under each entry (see §3.4.3 below); as a set of notes, on the other hand, an informal annotated bibliography need only include the source titles, web addresses (URLs that allow you to get back to the sources and collect more information about them later if you end up using them), and some summary points about the sources under each URL. When you begin your research investigation, however, you may want to collect only titles and URLs until you've narrowed down a list of sources you think you'll use, then go back and confirm their relevance by writing some notes under each. (Getting some note-form points down on paper—or on your word processor screen—counts as your first step in the actual writing of your document, giving you a foundation to build on, as we shall see in Chapter 4 below.)

The most relevant and useful sources meet the needs of the audience you are preparing your document for. For this you must choose sources with the right amount of detail. You may find plenty of general sources that offer decent introductions (e.g., from *Wikipedia*) but fall short of providing appropriate detail; in such cases you might be able to find more detailed coverage in the sources that they've used if those introductory sources you found are credible for having properly documented their research in the first place. On the other end of the spectrum, sources such as peer-reviewed journal articles might offer a level of detail that far exceeds what you need along with content that goes way over your head; you may want to include these as mere citations if only to point readers in the direction of credible evidence for a minor point supporting a major point. In such cases, you should at least ensure that they indeed prove your point rather than prove something distantly related but not relevant enough to your topic.

During this process you will encounter plenty of information in sources that may both confirm and contradict what you already know about your topic. It's important that you do what you're supposed to do as a student: keep an open mind and learn! Refrain from simply discarding contradictory information that will over-complicate your argument. If it turns out that a reputable source undermines your argument entirely, then this is the right point in the game to change your argument so that you don't end up embarrassing yourself in the end with a fantasy-driven document. If you're doing a research report into the viability of a waste-to-energy gasification facility, for instance, and you really want to say that it solves both your city's municipal garbage disposal and energy production needs, you don't want to find yourself too far down that road before addressing why no such facility has ever achieved profitable positive energy production. Ignoring such a record and the reasons why investors tend to avoid such opportunities, such as the failed Plasco plant in Ottawa (Chianello & Pearson, 2015), will undermine your credibility.

As a final word of warning, be careful with how you collect source content so that you don't accidentally plagiarize by the time you use the sources you've collected in your final document. If you copy and paste text from sources into your notes as a basis for quotations or paraphrases, ensure that you put quotation marks around it and cite the page numbers (if the source has them) or paragraph numbers (if it doesn't have page numbers) in parentheses immediately following the closing quotation marks so you can properly cite them if you go on to use them later. If you don't put quotation marks around copied text, you run the risk of committing plagiarism by rolling unmarked quotations into your final document; even if you cite them,

implying that you've paraphrased when you've really quoted still counts as a breach of academic integrity. We will return to the problem of plagiarism in the next section (§3.4) when we continue examining the process of building a document around research, but at this point it's worth reviewing your collection of research material to ensure that it meets the needs of the audience and works towards fulfilling the purpose you determined at the outset of the writing process.

Key Takeaways



Narrowing down a research topic involves skimming through database search results to select relevant sources, as well as skimming through source text to pull out main points that support your hypothesis by knowing where to find them.

Exercises



Building on Exercise #1 in the previous section (§3.2), develop the sources you found into an informal annotated bibliography with just titles and URLs for each source, as well as 2-3 main points in quotation marks pulled from the source text and bullet-listed under each URL.

References

Chianello, J., & Pearson, M. (2015, February 10). *Ottawa severs ties with Plasco as company files for creditor protection*. Ottawa Citizen. Retrieved from <http://ottawacitizen.com/news/local-news/plasco-energy-group-files-for-creditor-protection>

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3.4: USING SOURCE TEXT: QUOTING, PARAPHRASING, AND SUMMARIZING

Learning Objectives



3. Quote source text directly with accuracy and correct punctuation.
4. Use effective reading strategies to collect and reframe information from a variety of written materials accurately.
5. Locate, select, and organize relevant and accurate information drawn from a variety of sources appropriate to the task.
6. Integrate and document information using commonly accepted citation guidelines.

Once you have a collection of credible sources as part of a formal secondary research project such as a report, your next step is to build that report around those sources, using them as anchors of evidence around your own arguments. If you began with an hypothesis and you're using the sources as evidence to support it, or if you realize that your hypothesis is wrong because all the credible sources you've found poked holes in it, you should at this point be able to draft a thesis—your whole point in a nutshell. From there, you can arrange your sources in an order that follows a logical sequence such as general to specific or advantages versus disadvantages. We will examine organizational structures in the next chapter (Ch. 4) on drafting, but we are now going to focus on how to incorporate source material into usable evidence.

You essentially have four ways of using source material available to you, three of them involving text, and one media:

- **Quoting text:** copying the source's exact words and marking them off with quotation marks
- **Paraphrasing text:** representing the source's ideas in your own words (without quotation marks)
- **Summarizing text:** representing the source's main ideas in your own words (without quotation marks)
- **Reproducing media:** embedding pictures, videos, audio, graphic elements, etc. into your document

In each case, acknowledging your source with a citation at the point of use and follow-up bibliographical reference at the end of your document (see §3.5 below) is essential to avoid a charge of plagiarism. Let's now look at each of these in turn.

- 3.4.1: **Quoting Sources**
- 3.4.2: **Paraphrasing Sources**
- 3.4.3: **Summarizing Sources**

3.4.1: Quoting Sources

Quoting is the easiest way to use sources in a research document, but it also requires care in using it properly so that you don't accidentally plagiarize, misquote, or overquote. At its simplest, quoting takes source text exactly as it is and puts quotation marks (“ ”) around that text to set it off from your own words. The following points represent conventions and best practices when quoting:

- **Use double quotation marks:** In North America, we set off quoted words from our own words with double quotation marks (“ ”). Opening quotation marks look a little like a tiny superscript “66” and the closing marks like “99.” For a mnemonic device, you might want to think of a quotation as a hockey legend play with Mario Lemieux (jersey number 66) setting up Wayne Gretzky (99) for the goal.
 - You may have seen single quotation marks and think that they're also acceptable to use, but that's only true in the UK and some other Commonwealth countries, not in Canada; some European countries use << >> to set off quotations instead.
 - Also use double quotation marks for putting a single word or two in “scare quotes” when you're drawing attention to how people use certain words and phrases—again, not single quotation marks since there is no such thing as quotation marks “lite.”
 - Use **single quotation marks** only for reported speech when you have a quotation within a quotation, as in, “The minister responded to say, ‘No comment at this time’ regarding the allegations of wrongdoing.”
 - If no parenthetical citation follows immediately after the closing quotation marks, the sentence-ending period falls to the *left* of those closing quotation marks (between the final letter and the “99”); a common mistake is to place the period to the right of the closing quotation marks (. . . wrongdoing”).
- **Use a signal phrase to integrate a quotation:** Frame a quotation with a “signal phrase” that identifies the source author or speaker by name and/or role along with a verb relating how the quotation was delivered. The signal phrase can precede, follow, or even split the quotation, and you can choose from a variety of available signal phrase expressions suitable for your purposes (Hacker, 2006, p. 603):

- According to researchers Tblisky and Darion (2003), “...”
- As Vice President of Operations Rhonda Rendell has noted, “...”
- John Rucker, the first responder who pulled Mr. Warren from the wreckage, said that “...”
- Spokespersons Gloria and Tom Grady clarified the new regulations: “...”
- “...,” confirmed the minister responsible for the initiative.
- “...,” writes Eva Hess, “...”
- **Quote purposefully:** Quote only when the original wording is important. When we quote famous thinkers like Albert Einstein or Marshall McLuhan, we use their exact words because no one could say it better or more interestingly than they did. Also quote when you want your audience to see wording *exactly* as it appeared in the source text or as it was said in speech so that they can be sure that you’re not distorting the words as you might if you paraphrased instead. But if there’s nothing special about the original wording, then you’re better to paraphrase properly (see §3.4.2 below) than to quote.
- **Block-quote sparingly if at all:** In rare circumstances, you may want to quote a few sentences or even a paragraph at length if it’s important to represent every single word. If so, the convention is to tab the passage in on both the left and right, not use quotation marks at all, set up the quotation with a signal phrase or sentence ending with a colon, and place the in-text citation following the final period of the block quotation. Consider the following example:
 - Students frequently overuse direct quotation [when] taking notes, and as a result they overuse quotations in the final [research] paper. Probably only about 10% of your final manuscript should appear as directly quoted matter. Therefore, you should strive to limit the amount of exact transcribing of source materials while taking notes. (Lester, 1976, pp. 46-47)
- **Don’t overquote:** As the above source says, a good rule of thumb is that your completed document should contain no more than 10% quoted material. Much above that will look lazy because it appears that you’re getting quotation to write your document for you. Quote no more than a sentence or two at a time if you quote at all.
- **Quote accurately:** Don’t misquote by editing the source text on purpose or fouling up a transcription accidentally. Quotation requires the *exact* transcription of the source text, which means writing the same words in the same order in your document as you found them in the original.
 - To avoid introducing spelling mistakes or other transcription errors, best practice (if your source is electronic) is to highlight the text you want to quote, copy it (ctrl. + c), and paste it (ctrl. + v) into your document so that it matches the formatting of the rest of your document (i.e., with the same font type, size, etc.). To match the formatting, use the Paste Options drop-down menu that appears beside pasted text as soon as you drop it in and disappears as soon as you perform any operation other than clicking on the drop-down menu.
- **Use brackets and ellipses to indicate edits to quotations:** If you need to edit a quotation to be grammatically consistent with your own sentences framing the quotation (e.g., so that the tense is consistently past-tense if it is present-tense in the source text), add clarifying words, or delete words, do

so using brackets for changed words and ellipses for deleted words as you can see in the Lester block quotation above.

- Though many people mistakenly refer to parentheses () as “brackets”, brackets are squared [] and are used mainly to indicate changes to quoted words, whereas parentheses follow the quotation and mark off the citation. If you were to clarify and streamline the final sentence of the block quotation a few points above, for instance, you could say something like: Lester (1976) recommended “limit[ing] the amount of exact transcribing . . . while taking notes” (p. 47). Here, the verb “limit” in the source text needs to be converted into its participle form (having an *-ing* ending) to follow the past-tense verb in the sentence framing the quotation grammatically. Sneakily adding the “ing” to “limit” without using brackets would be *misquotation* because “limiting” appears nowhere in the original.
- Notice that the ellipsis above is three *spaced* periods (not three stuck together, as in “...”) and that one doesn’t appear at the beginning of the quotation to represent the words in the original prior to “limit” nor at the end to represent source text following the quoted words (“... limit ...”). Use the ellipsis only to show that you’re skipping over unnecessary words *within* a quotation.
- Be careful not to use brackets and ellipses in a way that distorts or obscures the meaning of the original text. For instance, omitting “Probably” and changing “should” to “[can]” in the Lester quotation above will turn his soft guideline into a hard rule, which are not the same.
- If the quotation includes writing errors such as spelling mistakes, show that they’re the author’s (rather than yours) by adding “[*sic*]” immediately after each error (“*sic*” abbreviates *sic erat scriptum*, Latin for “thus it had been written”), as in:
 - When you said in the class discussion forum, “No one cares about grammer, [*sic*] it doesnt [*sic*] really matter,” you tend to undermine your credibility on the topic with poor spelling and a comma splice.
- Capitalize as in the original, even if it seems strange to start a quotation with a capital (because it was the first word in the original) though it’s no longer the first word because it follows a signal phrase in your sentence. See the example in the point above, for instance.
- Quotation is a powerful tool in the arsenal of any writer needing to support a point with evidence. Capturing the source’s words exactly as they were written or spoken is an honest way of presenting research. For more on quotation, consult *Purdue OWL*’s series of modules starting with the How to Use Quotation Marks page (Conrey, Pepper, & Brizee, 2017) and ending with their Exercise (2013).

References

Conrey, S. M., Pepper, M., & Brizee, A. (2013, April 3). *Quotation mark exercise and answers*. Purdue OWL. Retrieved from <https://owl.english.purdue.edu/owl/resource/577/05/>

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Hacker, Diana. (2006). *The Bedford handbook (7th ed.)*. New York: St. Martin's. Retrieved from https://department.monm.edu/english/mew/signal_phrases.htm

Lester, J. D. (1976). *Writing research papers: A complete guide (2nd ed.)*. Glenview, Illinois: Scott, Foresman.

3.4.2: Paraphrasing Sources

Paraphrasing or “indirect quotation” is putting source text in your own words and altering the sentence structure to avoid using the quotation marks required in direct quotation. Paraphrasing is the preferred way of using a source when the original wording isn’t important. This way, you can incorporate the source’s ideas so they’re stylistically consistent with the rest of your document and thus better tailored to the needs of your audience (presuming the original was tailored for a different audience with different needs). Also, paraphrasing a source into your own words proves your advanced understanding of the source text.

A paraphrase must faithfully represent the source text by containing the same ideas as in the original in about the same length. As a matter of good writing, however, you should try to streamline your paraphrase so that it tallies fewer words than the source passage while still preserving the original meaning. An accurate paraphrase of the Lester (1976) passage block-quoted in the section above, for instance, can reduce a five-line passage to three lines without losing or distorting any of the original points:

Lester (1976) advises against exceeding 10% quotation in your written work. Since students writing research reports often quote excessively because of copy-cut-and-paste note-taking, try to minimize using sources word for word (pp. 46-47).

Notice that using a few isolated words from the original (“research,” “students,” “10%”) is fine, but also that this paraphrase doesn’t repeat any two-word sequence from the original because it changes the sentence structure along with most of the words. Properly paraphrasing without distorting, slanting, adding to, or

deleting ideas from the source passage takes skill. The stylistic versatility required to paraphrase can be especially challenging to EAL learners and native English users whose general writing skills are still developing.

A common mistake that students make when paraphrasing is to go only part way towards paraphrasing by substituting-out major words (nouns, verbs, and adjectives) here and there while leaving the source passage's basic sentence structure intact. This inevitably leaves strings of words from the original untouched in the "paraphrased" version, which can be dangerous because including such direct quotation without quotation marks will be caught by the plagiarism-busting software that college instructors use these days. Consider, for instance, the following botched attempt at a paraphrase of the Lester (1976) passage that subs out words selectively (lazily):

Students often overuse quotations when taking notes, and thus overuse them in research reports. About 10% of your final paper should be direct quotation. You should thus attempt to reduce the exact copying of source materials while note taking (pp. 46-47).

Let's look at the same attempt, but colour the unchanged words red to see how unsuccessful the paraphraser was in rephrasing the original in their own words (given in black):

Students often **overuse** quotations **when taking notes**, and thus **overuse** them **in research** reports. **About 10% of your final** paper **should** be direct quotation. **You should** thus attempt **to** reduce **the exact** copying of **source materials** while note **taking** (pp. 46-47).

As you can see, several strings of words from the original are left untouched because the writer didn't go the distance in changing the sentence structure of the original. The Originality Report from plagiarism-catching software such as Turnitin would indicate that the passage is 64% plagiarized because it retains 25 of the original words (out of 39 in this "paraphrase") but without quotation marks around them. Correcting this by simply adding quotation marks around passages like "when taking notes, and" would be unacceptable because those words aren't important enough on their own to warrant direct quotation. The fix would just be to paraphrase more thoroughly by altering the words *and* the sentence structure, as shown in the paraphrase a few paragraphs above. But how do you go about doing this?

Paraphrase easily by breaking down the task into these seven steps:

1. Read and re-read the source-text passage so that you thoroughly understand each point it makes. If it's a long passage, you might want to break it up into digestible chunks. If you're unsure of the meaning of any of the words, look them up in a dictionary; you can even just type the word into the Google search bar, hit *Enter*, and a definition will appear, along with results of other online dictionary pages that define the same word.
2. Look away and get your mind off the target passage. Process some different information for a while (e.g., a few minutes of gaming or social media—but just a few!)
3. Without looking back at the source text, repeat its main points as you understood them—not from memorizing the exact words, but as you would explain the same ideas in different words out loud to a

friend.

4. Still without looking back at the source text, jot down that spoken wording and tailor the language so that it's stylistically appropriate for your audience; edit and proofread your written version to make it grammatically correct in a way that perhaps your spoken-word version wasn't.
5. Now compare your written paraphrase version to the original to ensure that:
 - You've accurately represented the meaning of the original without:
 - Deleting any of the original points
 - Adding any points of your own
 - Distorting any of the ideas so they mean something substantially different from those in the original, or even take on a different character because you use words that, say, put a positive spin on something neutral or negative in the original
 - You haven't repeated any two identical words from the original in a row
6. If any two words from the original remain, go further in changing those expressions by using a thesaurus in combination with a dictionary. When you enter a word into a thesaurus, it gives you a list of synonyms, which are different words that mean the same thing as the word you enter into it.
 - Be careful, however; many of those words will mean the same thing as the word you enter into the thesaurus in certain contexts but not in others, especially if you enter a homonym, which is a word that has different meanings in different parts of speech.
 - For instance, the noun *party* can mean a group that is involved in something serious (e.g., a third-party software company in a data-collection process), but the verb *party* means something you do on a wild Saturday night out with friends; it can also function as an adjective related to the verb (e.g., *party trick*, meaning a trick performed at a party).
 - Whenever you see synonymous words listed in a thesaurus and they look like something you want to use but you don't know what they mean exactly, always look them up to ensure that they mean what you hope they mean; if not, move on to the next synonym until you find one that captures the meaning you intend. Doing this can save your reader the confusion and you the embarrassment of obvious thesaurus-driven diction problems (poor word choices).
7. Cite your source. Just because you didn't put quotation marks around the words doesn't mean that you don't have to cite your source. For more on citing, see §3.5.2 below).

For more on paraphrasing, consult the *Purdue OWL* Paraphrasing learning module (Cimasko, 2013), Exercise, and Answer Key.

References

Cimasko, T. (2013, March 22). *Paraphrasing*. *Purdue OWL*. Retrieved from <https://owl.english.purdue.edu/owl/resource/976/02/>

3.4.3: Summarizing Sources

Summarizing is one of the most important skills in communications because professionals of every kind must explain to non-expert customers, managers, and even co-workers the complex concepts on which they are experts, but in a way that those non-experts can understand. Adapting the message to such audiences requires brevity but also translating jargon-heavy technical details into plain, accessible language.

Summarizing is thus paraphrasing only the highlights of a source text or speech. Like paraphrasing, a summary is indirect quotation that re-casts the source in your own words; unlike a paraphrase, however, a summary is a fraction of the source length—anywhere from less than 1% to a quarter depending on the source length and length of the summary. A summary can reduce a whole novel or film to a single-sentence blurb, for instance, or it could reduce a 50-word paragraph to a 15-word sentence. It can be as casual as a spoken run-down of a meeting your colleague was absent from and wanted to know what he missed, or an elevator pitch selling a project idea to a manager. It can also be as formal as a memo report on a conference you attended on behalf of your organization so your colleagues there can learn in a few minutes of reading the highlights of what you learned in a few days of attending the conference, saving them time and money.

The procedure for summarizing is much like that of paraphrasing except that it involves the extra step of pulling out highlights from the source. Altogether, this can be done in six steps, one of which includes the seven steps of paraphrasing, making this a twelve-step procedure:

1. Determine how big your summary should be (according to your audience's needs) so that you have a sense of how much material you should collect from the source.
2. Read and re-read the source text so that you thoroughly understand it.
3. Pull out the main points, which usually come first at any level of direct-approach organization (i.e., the prologue or introduction at the beginning of a book, the abstract at the beginning of an article, or the topic sentence at the beginning of a paragraph); review §3.3 above on reading for main points and §4.1 below on organizational patterns.

- Disregard detail such as supporting evidence and examples.
 - If you have an electronic copy of the source, copy and paste the main points into your notes; for a print source that you can mark up, use a highlighter then transcribe those main points into your electronic notes.
 - How many points you collect depends on how big your summary should be (according to audience needs).
4. Paraphrase those main points following the seven-step procedure for paraphrasing outlined in §3.4.2 above.
 5. Edit your draft to make it coherent, clear, and especially concise.
 6. Ensure that your summary meets the needs of your audience and that your source is cited. Again, not having quotation marks around words doesn't mean that you are off the hook for documenting your source(s).

Once you have a stable of summarized, paraphrased, and quoted passages from research sources, building your document around them requires good organizational skills. We'll focus more on this next step of the drafting process in the following chapter (Ch. 4), but basically it involves arranging your integrated research material in a coherent fashion, with main points up front and supporting points below proceeding in a logical sequence towards a convincing conclusion. Throughout this chapter, however, we've frequently encountered the requirement to document sources by citing and referencing, as in the last steps of both summarizing and paraphrasing indicated above. After reinforcing our quoting, paraphrasing, and summarizing skills, we can turn our focus on how to document sources.

Key Takeaway



Including research in your work typically involves properly quoting, paraphrasing, and/or summarizing source text, as well as citing it.

Exercises



Find an example of professional writing in your field of study, perhaps from a textbook, trade journal, or industry website that you collected as part of the previous section's informal annotated bibliography exercise.

1. If you've already pulled out the main points as part of the previous exercise, practice including them as properly punctuated quotations in your document with smooth signal phrases introducing them.
2. Paraphrase those same main-point sentences following the seven-step procedure outlined in §3.4.2 above. In other words, if Exercise 1 above was direct quotation, now try indirect quotation for each passage.
3. Following the six-step procedure outlined in §3.4.3 above, summarize the entire source article, webpage, or whatever document you chose by reducing it to a single coherent paragraph of no more than 10 lines on your page.

3.5: DOCUMENTING SOURCES IN APA, MLA, OR IEEE STYLES

Learning Objectives



6. Integrate and document information using commonly accepted citation guidelines.

To prove formally that we've done research, we use a two-part system for documenting sources. The first part is a citation that gives a few brief pieces of information about the source right where that source is used in our document and points to the second part, the bibliographic reference at the end of the document. This second part gives further details about the source so that readers can easily retrieve it themselves. Though documenting research requires a little more effort than not, it looks so much better than including research in a document without showing where you got it, which is called plagiarism. Before focusing further on how to document sources, it's worthwhile considering why we do it and what exactly is wrong with plagiarism.

- 3.5.1: Academic Integrity *vs.* Plagiarism
- 3.5.2: Citing and Referencing in APA Style
- 3.5.3: Citing and Referencing in MLA Style
- 3.5.4: Citing and Referencing in IEEE Style
- 3.5.5: Citing Images and Other Media

3.5.1: Academic Integrity *vs.* Plagiarism

Academic integrity basically means that you do your work yourself and formally credit your sources when you use research, whereas plagiarism is cheating. Students often plagiarize by stealing the work of others from the internet (e.g., copying and pasting text, or dragging and dropping images) and dumping it into an assignment without quoting or citing; putting their name on that assignment means that they've dishonestly presented

someone else's work as their own. Lesser violations involve not quoting or citing properly. But why would anyone try to pull one over on their instructor like this when instructors award points for doing research? If you're going to do your homework, you might as well do it right by finding credible sources, documenting them, and getting credit for doing so rather than sneak your research in as if you'll get points for originality, for coming up with professional-grade material yourself, and end up getting penalized for it. But what makes plagiarism so wrong?

Plagiarism is theft, and bad habits of stealing others' work in school likely begin as liberal attitudes towards intellectual property in our personal lives, but often develop into more serious crimes of copyright or patent violations in professional situations with equally serious financial penalties or destruction of reputations and earning power. The bad habits perhaps start from routines of downloading movies and music illegally because, well, everybody's does it and few get caught (Helbig, 2014), or so the thinking goes; the rewards seem to outweigh the risks. But when download bandits become professionals, and are tasked with, say, posting on their company website some information about a new service the company is offering, their research and writing procedure might go something like this:

1. They want their description of the service to look professional, so they Google-search to see what other companies offering the same service say about it on their websites. So far so good.
2. Those other descriptions look good, and the employee can't think of a better way to put it, so they copy and paste the other company's description into their own website. Here's where things go wrong.
3. They also see that the other company has posted an attractive photo beside their description, so the employee downloads that and puts it on their website also.

The problem is that both the text and photo were copyrighted, as indicated by the "All Rights Reserved" copyright notice at the bottom of the other company's webpage. Once the employee posts the stolen text and photo, the copyright owner (or their legal agents) find it through a simple Google search, Google Alerts notification, reverse image search, or digital watermarking notification (Rose, 2013). The company's agents send them a "cease & desist" order, but they ignore it and then find that they're getting sued for damages. Likewise, if you're in hi-tech R&D (research and development), help develop technology that uses already-patented technology without paying royalties to the patent owner, and take it to market, the patent owner is being robbed of the ability to bring in revenue on their intellectual property themselves and can sue you for lost earnings. Patent, copyright, and trademark violations are a major legal and financial concern in the professional world (SecureYourTrademark, 2015), and acts of plagiarism have indeed ruined perpetrators' careers when they're caught, which is easier than ever (Bailey, 2012).

Every college has its own plagiarism policy that helps you avoid the consequences of plagiarism. Algonquin College's policy, for instance, is very thorough:

Plagiarism, whether done deliberately or accidentally, is defined as presenting someone else's work, in whole or in part, as one's own. It includes the verbal or written submission of another work without crediting that source.

This applies to ideas, wording, code, graphics, music, and inventions. It includes all electronic sources, including the Internet, television, video, film, and recordings, all print and written sources, such as books, periodicals, lyrics, government publications, promotional materials, and academic assignments; and all verbal sources such as conversations and interviews. Sharing one's work with other students is also considered an act of plagiarism. (Algonquin College, 2016)

The first and last points are especially important: you can be penalized for (1) sloppy research that results in *accidental* plagiarism such as copying text from the internet but not identifying the source, forgetting where the text came from, then putting it in your assignment anyway in the final rush to get it done. Likewise, you can be penalized for casually dragging and dropping a photo from the internet into a PowerPoint presentation without crediting the source because putting your name on that presentation implies that you generated all the content, including that image, when in fact you just stole it. You can also be penalized for (2) providing a classmate with your work for the purposes of plagiarizing.

Algonquin's penalties for plagiarizing increase with each offense. Whether accidental or deliberate, your first act of plagiarism might result in getting a grade of zero on the assignment. However, the instructor may give you the opportunity to correct just the plagiarism in it, resubmit it, and get the mark you would have earned originally if not for the plagiarism. For instance, if your grade would have been 85% if it hadn't been zeroed due to the plagiarism, the instructor can change the grade back to 85% as soon as they see that you've corrected the plagiarism, but just leave the grade at 0% if you don't bother to correct it. Depending on the instructor and department, your instructor may submit the details to their manager so that a record of the offense is logged in case a second offense happens in that or course or another in the program. That way, the manager can see a pattern of plagiarism across all of the student's courses, a pattern that the instructors in each individual course don't see.

Your second offense could result in a grade of zero but without the opportunity to correct and resubmit it. When your instructor reports this to the department, the chair will likely put an "encumbrance" on your academic record. This means you are force-registered into an Academic Integrity online course that takes a few hours to complete. You won't be able to progress to the next semester or graduate without passing the course.

Subsequent plagiarism offenses after this can get you expelled from the course, from your program, and from the College altogether. You would probably be hotly pursuing expulsion if you became a serial plagiarist who knows that it's wrong and that you'll get caught but do it anyway. The internet may make cheating easier by offering easy access to coveted material, but it also makes detection easier in the same way.

Students who think they're too clever to get caught plagiarizing may not realize that plagiarism in anything they submit electronically is easily exposed by sophisticated plagiarism-detection software and other techniques. Most instructors use apps like Turnitin (built into the BrightSpace LMS) that produce originality reports showing the percentage of assignment content copied from sources found either on the public internet or in a global database of student-submitted assignments. That way, assignments borrowed or bought from someone who's submitted the same or similar will also be flagged. For instance, the software would alert the instructor of common plagiarism scenarios, such as when:

- Two students in the same class submit substantially the same assignment work because:
 - One of them started working on it the night before it was due and got their classmate friend to send them their assignment draft, which the cheating student changed slightly to make it look different; it will still be 90% the same, which is enough for the instructor to give both a zero and require that they meet after class to discuss who did what. Remember that supplying someone with materials for the purpose of plagiarism is also a punishable offense.
 - They worked on the assignment together, even though it was designated an individual assignment only, but each changed a few details here and there at the end to make the submissions look different.
- A student submits an assignment that was previously submitted by another student in another class at the same time or in the past, at a different school, or even on the other side of the planet (either way, they're all in the global database).

Other techniques allow instructors to track down uncited media just as professional photographers or stock photography vendors like Getty Images use digital watermarks or reverse image searches to find unpermitted uses of their copyrighted material.

Plagiarism is also easy to sniff out in hardcopy assignments by any but the most novice and gullible instructors. Dramatic, isolated improvements in a student's quality of work either between assignments or within an assignment will trigger an instructor's suspicions. If a student's writing on an assignment is mostly terrible with multiple writing errors in each sentence, but then is suddenly perfect and professional-looking in one sentence only without quotation marks or a citation, the instructor just runs a Google search on that sentence to find where exactly it was copied from.

A cheater's last resort to try to make plagiarism untraceable is to pay someone to do a customized assignment for them, but this still arouses suspicions for the same reasons as above. The student who goes from submitting poor work to perfect work becomes a "person of interest" target to their instructor in all that they do after that. The hack also becomes expensive not only for that assignment but also for all the instances when the cheater will have to pay someone to do the work that they should have just learned to do themselves. For all these reasons, it's better just to learn what you're supposed to by doing assignments yourself and showing academic integrity by crediting sources properly when doing research.

But do you need to cite absolutely *everything* you research? Not necessarily. Good judgment is required to know what information can be left uncited without penalty. If you look up facts that are common knowledge (perhaps just not common to you yet, since you had to look them up), such as that the first Prime Minister of Canada Sir John A. MacDonald represented the riding of Victoria for his second term as PM even without setting foot there, you wouldn't need to cite them because any credible source you consulted would say the same. Such citations end up looking like attempts to pad an assignment with research.

Certainly anything quoted directly from a source (because the wording is important) must be cited, as well

as anyone's original ideas, opinions, or theories that you paraphrase or summarize (i.e., indirectly quote) from a book, article, or webpage with an identifiable author, argument, and/or primary research producing new facts. You must also cite any media such as photos, videos, drawings/paintings, graphics, graphs, etc. If you are ever unsure about whether something should be cited, you can always ask your librarian or, better yet, your instructor since they'll ultimately assess your work for academic integrity. Even the mere act of asking assures them that you care about academic integrity. For more on plagiarism, you can also visit plagiarism.org and the *Purdue OWL* Avoiding Plagiarism series of modules (Elder, Pflugfelder, & Angeli, 2010).

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3.5.2: Citing and Referencing Sources in APA Style

As mentioned above, a documentation system comes in two parts, the first of which briefly notes a few details about the source (author, year, and location) in parentheses immediately after you use the source, and this citation points the reader to more reference details (title and publication information) in a full bibliographical entry at the end of your document. Let's now focus on these in-text citations ("in-text" because the citation

is placed at the point of use in your sentence rather than footnoted or referenced at the end) in the different documentation styles—APA, MLA, and IEEE—used by different disciplines across the college.

The American Psychological Association’s documentation style is preferred by the social sciences and general disciplines such as business because it strips the essential elements of a citation down to a few pieces of information that briefly identify the source and cue the reader to further details in the References list at the back. The basic structure of the parenthetical in-text citation is as follows:

- Signal phrase, direct or indirect quotation (Smith, 2018, p. 66).

Its placement tells the reader that everything between the signal phrase and citation is either or direct or indirect quotation of the source, and everything after (until the next signal phrase) is your own writing and ideas. As you can see above, the three pieces of information in the citation are author, year, and location. Follow the conventions for each discussed below:

1. **Author(s)** last name(s)

- The author’s last name (surname) and the year of publication (in that order) can appear either in the signal phrase or citation, but not in both. Table 3.5.2 below shows both options (e.g., Examples 1 and 3 versus 2 and 4, etc.).
- When two authors are credited with writing a source, their surnames are separated by “and” in the signal phrase and an ampersand (&) in the parenthetical citation (see Examples 3-4 in Table 3.5.2 below).
- When 3-5 authors are credited, a comma follows each surname (except the last in the signal phrase) and citation, and the above and/& rule applies between the second-to-last (penultimate) and last surname.
 - When a three-, four-, or five-author source is used again following the first use (i.e., the second, third, fourth time, etc.), “et al.” (abbreviating *et alium* in Latin, meaning “and the rest”) replaces all but the first author surname.
 - See Examples 5-6 in Table 3.5.2 below.
- If two or more authors of the same work have the same surname, add first/middle initials in the citation as given in the References at the back.
- If no author name is given, either use the organization or company name (corporate author) or, if that’s not an option, the title of the work in quotation marks.
 - If the organization is commonly referred to by an abbreviation (e.g., “CIHR” for the Canadian Institutes of Health Research), spell out the full name in the signal phrase and put the abbreviation in the parenthetical citation the first time you use it, or spell out the full name in the citation and add the abbreviation in brackets before the year of publication that first time, then use the abbreviation for all subsequent uses of the same source. See Examples 9-10 in Table 3.5.2 below).

- If no author of any kind is available, the citation—e.g., (“APA Style,” 2008)—and the bibliographical entry at the back would move the title “APA style” (ending with a period and not in quotation marks) into the author position with “(2008)” following rather than preceding it.
- If the source you’re using quotes another source, try to find that other, original source yourself and use it instead. If it’s important to show both, you can indicate the original source in the signal phrase and the source you accessed it through in the citation, as in:
 - Though kinematics is now as secular as science can possibly be, in its 1687 *Pincipia Mathematica* origins Sir Isaac Newton theorized that gravity was willed by God (as cited in Whaley, 1977, p. 64).

2. **Year** of Publication

- The publication year follows the author surname either in parentheses on its own if in the signal phrase (see the odd-numbered Examples in Table 3.5.2 below) or follows a comma if both are in the citation instead (even-numbered Examples).
- If the full reference also indicates a month and date following the year of publication (e.g., for news articles, blogs, etc.), the citation still shows just the year.
- If you cite two or more works by the same author published in the same year, follow the year with lowercase letters (e.g., 2018a, 2018b, 2018c) in the order that they appear alphabetically by title (which follows the author and year) in both the in-text citations and full bibliographical entries in the References at the back.

3. **Location** of the direct or indirect quotation within the work used

- Include the location if your direct or indirect quotation comes from a precise location within a larger work because it will save the reader time knowing that a quotation from a 300-page book is on page 244, for instance, if they want to look it up themselves.
- Don’t include the location if you’ve summarized the source in its entirety or referred to it only in passing, perhaps in support of a minor point, so that readers can find the source if they want to read further.
- For source text organized with page numbers, use “p.” to abbreviate “page” or “pp.” to abbreviate “pages.” For instance, “p. 56,” indicates that the direct or indirect quotation came from page 56 of the source text, “pp. 192-194” that it came from pages 192 through 194, inclusive, and “pp. 192, 194” from pages 192 and 194 (but not 193).
- For sources that have no pagination, such as webpages, use paragraph numbers (whether the paragraphs are numbered by the source text or not) preceded by the paragraph symbol “¶” (called a pilcrow) or the abbreviation “para.” if the pilcrow isn’t available (see Examples 1-2 and 5-6 in the table below).

Table 3.5.2 shows how these guidelines play out in sample citations with variables such as the placement of the author and year in either the signal phrase or parenthetical in-text citation, number of authors, and source types. Notice that, for punctuation:

- Parentheses () are used for citations, not brackets []. The second one, “),” is called the closing parenthesis.
- The sentence-ending period *follows* the citations, so if the original source text of a quotation ended with a period, you would move it to the *right* of the citation’s closing parenthesis.
- If the quoted text ended with a question mark (?) or exclamation mark (!), the mark stays within the quotation marks (i.e., to the left of the closing quotation marks) and a period is still added to end the sentence; if you want to end your sentence and quotation with a period or exclamation mark, it would simply replace the period to the right of the closing parenthesis (see Example 8 in the table below).

Table 3.5.2: Example APA-style In-text Citations with Variations in Number of Authors and Source Types

Ex.	Signal Phrase	In-text Citation	Example Sentences Citing Sources
1.	Single author + year	Paragraph location on a webpage	According to CEO Kyle Wiens (2012), “Good grammar makes good business sense” (¶ 7).
2.	Generalization	Single author + year + location	Smart CEOs know that “Good grammar makes good business sense” (Wiens, 2012, ¶ 7).
3.	Two authors + year	Page number in a paginated book	Smart CEOs know that “Good grammar makes good business sense” (Wiens, 2012, ¶ 7). As Strunk and White (2000) put it, “A sentence should contain no unnecessary words . . . for the same reason that a . . . machine [should have] no unnecessary parts” (p. 32).
4.	Book title	Two authors + year + page number	As the popular <i>Elements of Style</i> authors put it, “A sentence should contain no unnecessary words” (Strunk & White, 2000, p. 32).
5.	Three authors + year for first and subsequent instances	Paragraph location on a webpage	Conrey, Pepper, and Brizee (2017) advise, “successful use of quotation marks is a practical defense against accidental plagiarism” (¶ 1). . . . Conrey et al. also warn, “indirect quotations still require proper citations, and you will be committing plagiarism if you fail to do so” (¶ 6).
6.	Website	Three authors + year + location for first and subsequent instances	The <i>Purdue OWL</i> advises that “successful use of quotation marks is a practical defense against accidental plagiarism” (Conrey, Pepper, & Brizee, 2017, ¶ 1). . . . The <i>OWL</i> also warns, “indirect quotations still require proper citations, and you will be committing plagiarism if you fail to do so” (Conrey et al., 2017, ¶ 6).
7.	More than five authors + year	Page number in an article	John Cook et al. (2016) prove that “Climate scientists overwhelmingly agree that humans are causing recent global warming” (p. 1).
8.	Generalization	More than four authors + year + page number	How can politicians still deny that “Climate scientists overwhelmingly agree that humans are causing recent global warming” (John Cook et al., 2016, p. 1)?
9.	Corporate author + year	Page number in a report	The Mental Health Commission of Canada (MHCC, 2012) recommends that health care spending on mental wellness increase from 7% to 9% by 2022 (p. 13). . . . The MHCC (2012) estimates that “the total costs of mental health problems and illnesses to the Canadian economy are at least \$50 billion per year” (p. 125).
10.	Paraphrase instead	Corporate author + year + page number	Spending on mental wellness should increase from 7% to 9% by 2022 (The Mental Health Commission of Canada [MHCC], p. 13). . . . Current estimates are that “the total costs of mental health problems and illnesses to the Canadian economy are at least \$50 billion per year” (MHCC, 2012, p. 125).

For more on APA-style citations, see Purdue OWL's In-Text Citations: The Basics (Paiz et al., 2017) and its follow-up page on authors.

In combination, citations and references offer a reader-friendly means of enabling readers to find and retrieve research sources themselves, as each citation points them to the full bibliographical details in the References list at the end of the document. If the documentation system were reduced to just one part where citations were filled with the bibliographical details, the reader would be constantly impeded by 2-3 lines of bibliographical details following each use of a source. By tucking the bibliographical entries away at the back, authors also enable readers to go to the References list to examine at a glance the extent to which a document is informed by credible sources as part of a due-diligence credibility check in the research process (see §3.2 above).

Each bibliographical entry making up the References list includes information about a source in a certain order. Consider the following bibliographical entry for a book in APA style, for instance:

Strunk, W., & White, E. B. (2000). *Elements of style* (4th ed.). Boston: Allyn & Bacon.

We see here a standard sequence including the authors, year of publication, title (italicized because it's a long work), and publication information. You can follow this closely for the punctuation and style for any book. Online sources follow much the same style, except that the publisher location and name are replaced by the web address preceded by "Retrieved from," as in:

Wiens, K. (2012, July 20). I won't hire people who use poor grammar. Here's why. *Harvard Business Review*. Retrieved from <http://blogs.hbr.org/2012/07/i-wont-hire-people-who-use-poo/>

Note also that the title has been split into both a webpage title (the non-italicized title of the article) in sentence style and the title of the website (italicized because it's the larger work from which the smaller one came). The easiest way to remember the rule for whether to italicize the title is to ask yourself: *is the source I'm referencing the part or the whole?* The *whole* (a book, a website, a newspaper title) is always in italics, whereas the *part* (a book chapter, a webpage, a newspaper article title) is not; see the third point below on Titles for more on this). A magazine article reference follows a similar sequence of information pieces, albeit replacing the publication or web information with the volume number, issue number, and page range of the article within the magazine, as in:

Dames, K. M. (2007, June). Understanding plagiarism and how it differs from copyright infringement. *Computers in Libraries*, 27(6), 25-27.

With these three basic source types in mind, let's examine some of the guidelines for forming bibliographical entries with a view to variations for each part such as number and types of authors and titles:

- **Author(s):** The last name followed by a comma and the author's first initial (and middle initial[s] if given)
 - For two authors, add a comma and ampersand (&) after the first author's initials
 - For three or more authors, add a comma after each (except for the last one) and add an ampersand between the second-to-last (penultimate) and last author.
 - Follow the order of author names as listed in the source. If they are in alphabetical order already, it

may be because equal weight is being given to each; if not, it likely means that the first author listed did most of the work and therefore deserves first mention.

- If no personal name is given for the author, use the name of the organization (i.e., corporate author) or editor(s) (see the point on editors below).
 - If no corporate author name is given, skip the author (don't write "*Anon.*" or "N.A.") and move the title into the author position with the year in parentheses following the title rather than preceding it.
- **Year of publication:** In parentheses followed by a period
 - If an exact calendar date is given (e.g., for a news article or blog), start with the year followed by a comma, the month (fully spelled out) and date, such as "(2017, July 25)." Some webpages will indicate the exact calendar date and time they were updated, in which case use that because you can assume that the authors checked to make sure all the content was current as of that date and time. Often, the only date given on a website will be the copyright notice at the bottom, which is the current year you're in and common to all webpages on the site, even though the page you're on could have been posted long before; see the technique in the point below, however, for discovering the date that the page was last updated.
 - If no date is given, indicate "(n.d.)," meaning "no date." For electronic sources, however, you can determine the date in the Google Chrome browser by typing "inurl:" and the URL of the page you want to find the date for into the Google search bar, hitting "Enter," adding "&as_qdr=y15" to the end of the URL in the address bar of the results page, and hitting "Enter" again; the date will appear in grey below the title in the search list.
 - If listing multiple sources by the same author, the placement of the years of publication means that bibliographical entries must be listed chronologically from earliest to most recent.
 - If listing two or more sources by the same author in the same year (without month or date information), follow the year of publication with lowercase letters arranged alphabetically by the first letter in the title following the year of publication (e.g., 2018a, 2018b, 2018c).
 - **Title(s):** Give the title in "sentence style"—i.e., the first letter is capitalized, but all subsequent words are lowercase except those that would be capitalized anyway (proper nouns like personal names, place names, days of the week, etc.) or those to the right of a colon dividing the main title and subtitle, and end it with a period.
 - If the source is a smaller work (usually contained in a larger one), like an article in a newspaper or scholarly journal, a webpage or video on a website, a chapter in a book, a short report (less than 50 pages), a song on an album, a short film, etc., make it plain style without quotation marks, and end it with a period.
 - If the source is a smaller work that is contained within a larger one, follow it with the title of the

longer work capitalized as it is originally with all major words capitalized (i.e., don't make the larger work sentence-style), italicized, and ending with a period.

- If the source is a longer work like a book, website, magazine, journal, film, album, long report (more than 50 pages), italicize it. If it doesn't follow the title of a shorter work that it contains, make it sentence-style (see the *Elements of Style* example above, which becomes "*Elements of style*").
 - If the book is a later edition, add the edition number in parentheses and plain style following the title (again, see the *Elements of Style* example above).
- **Editor(s):** If a book identifies an editor or editors, include them between the title and publication information with their first-name initial (and middle initial if given) and last name (in that order), "(Ed.)" for a single editor or "(Eds.)" for multiple editors (separated by an ampersand if there are only two and commas plus an ampersand if there are three or more), followed by a period.
 - If the book is a collection of materials, put the editor(s) in the author position with their last name(s) first followed by "(Ed.)" or "(Eds.)," a period, then the year of publication, etc.
- **Publication information:** The city in which the publisher is based followed by a colon, the name of the publisher, and a period.
 - If the city is a common one such as New York City or Toronto, just put "New York" or "Toronto," but if it's an uncommon one like Nanaimo, follow it with a comma, provincial or state abbreviation, and then the colon (e.g., Nanaimo, BC:) and publisher name.
 - Keep the publisher name to the bare essentials; delete corporate designations like "Inc." or "Ltd."
- **Web information:** If the source is entirely online, replace the publisher location and name with "Retrieved from" and the web address (URL).
 - If the online source is likely to change over time, add the date you viewed it in "Month DD, YYYY," style after "Retrieved" so that a future reader who follows the web address to the source and finds something different from what you quoted understands that what you quoted has been altered since you viewed it.
 - If the source is a print edition (book, magazine article, journal article, etc.) that also has an online version, give the publication information as you would for the print source and follow it with the online retrieval information.
 - If all you're doing is mentioning a website in your text, you can just give the root URL (e.g., APAStyle.org without the "http://www" prefix) in your text rather than cite and reference it.
- **Magazine/Journal volume/issue information:** If the source is a magazine or journal article, replace the publisher information with the volume number, issue number, and page range.
 - Follow the italicized journal title with a comma, the volume number in italics, the issue number in

non-italicized parentheses (with no space between the volume number and the opening parenthesis), a comma, the page range with a hyphen between article's first and last page numbers, and a period.

- The Dames article given as an example above, for instance, spans pages 25-27 of the June issue (i.e., #6) of the monthly journal *Computers in Libraries*' 27th volume.
- **Other source types:** If you often encounter other source types such as government publications, brochures, presentations, etc., getting a copy of the *Publication Manual of the American Psychological Association* (APA, 2009) might be worth your while. If you're a more casual researcher, you can consult plenty of online tutorials for help with APA style such as:
 - Learning APA Style and link to the free flash slideshow "The Basics of APA Style: Tutorial" (APA, 2018)
 - Reference List: Basic Rules (Paiz et al., 2017) and the pages following

Though reference generator applications are available online (simply Google-search for them) and as features within word processing applications like Microsoft Word to construct citations and references for you, putting them together on your own may save time if you're adept at APA. The following guidelines help you organize and format your References page(s) according to APA convention when doing it manually:

- **Title:** References
 - Center the title at the top of the page at the end of your document (though you may include appendices after it if you have a long report).
 - The title is not "Works Cited" (as in MLA) nor "Bibliography"; a bibliography is a list of sources not tied to another document, such as the annotated bibliography discussed in §3.3 above.
- **Listing order:** Alphabetically (unnumbered) by first author surname
 - If a corporate author (company name or institution) is used instead of a personal name and it starts with "The," alphabetize by the next word in the title (i.e., include "The" in the author position, but disregard it when alphabetizing).
 - If neither a personal nor corporate author is identified, alphabetize by the first letter in the source title moved into the author position.
- **Spacing:** Single-space within each bibliographical entry, double between them
 - "Double between" here means adding a blank line between each bibliographical entry, as seen in the References section at the end of each section in this textbook.
 - You may see some institutions, publishers, and employers vary this with all bibliographical entries being double spaced; just follow whatever style guide pertains to your situation and ask whoever's assessing your work if unsure.

- **Hanging indentation:** The left edge of the first line of each bibliographical entry is flush to the left margin and each subsequent line of the same reference is tabbed in by a half centimeter or so.
 - To do this:

1. Highlight all bibliographical entries (click and drag your cursor from the top left to the bottom right of your list)
2. Make the ruler visible in your word processor (e.g., in MS Word, go to the View menu and check the “Ruler” box).
3. Move the bottom triangle of the tab half a centimeter to the right; this requires surgically pinpointing the cursor tip on the bottom triangle (in the left tab that looks like an hourglass with the top triangle’s apex pointing down, a bottom triangle with the apex pointing up, and a rectangular base below that) and dragging it to the right so that it detaches from the top triangle and base.

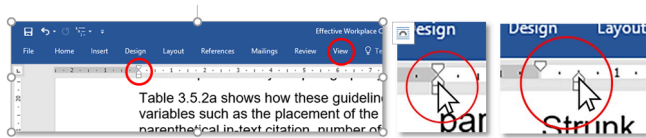


Figure 3.5.2: Tabbing a References list by making the left-margin tab visible, clicking on the bottom triangle, and dragging it a half-centimeter to the right

Examine the bibliographical entries below and throughout this textbook for examples of the variations discussed throughout.

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3.5.3: Citing and Referencing Sources in MLA Style

The Modern Languages Association (MLA) documentation style is favoured by humanities disciplines and is therefore rarely used in the vocational college system. Though both two-part systems apply many of the same principles in citing and referencing, MLA favours an even more streamlined structure of citation, reduced to just the author(s) and location with no comma between:

- Signal phrase, direct or indirect quotation (Smith 66).

Notice also how the “p.” we saw in APA is assumed (omitted) in MLA. Like APA, if the author is identified in the signal phrase, the contents of the parenthetical in-text citation are reduced to just the page number—e.g., “(66)” in the example above. Slight deviations from APA style also include using “and” instead of “&” to separate two authors in MLA in-text citations, and “et al.” replaces the second, third, and any other authors, even the first time it appears if the source has three or more authors. For more on MLA-style citations, see *MLA In-Text Citations: The Basics* (Russell et al., 2017).

MLA bibliographical entries are similar to APA references in many respects but different in certain details. Consider typical book, article, and online article bibliographical entries in an MLA-style Works Cited list:

Dames, K. Matthew. "Understanding Plagiarism and How It Differs from Copyright Infringement." *Computers in Libraries*, vol. 27, no. 6, 2007, pp. 25-27.

Strunk, William, and E. B. White. *Elements of Style*. 1959. 4th ed., Allyn & Bacon, 2000.

Wiens, Kyle. "I Won't Hire People Who Use Poor Grammar. Here's Why." *Harvard Business Review*, 20 July 2012, blogs.hbr.org/2012/07/i-wont-hire-people-who-use-poor/. Accessed 20 November 2017.

The following points cover major differences between MLA and APA:

- The title of the list of bibliographical entries is "Works Cited" rather than "References," but it is likewise centered as the top of the page.
- All bibliographical entries are double-spaced if the document text is double spaced with no additional space between entries, but single-spaced if the rest of the document is single-spaced.
- Authors' first names are fully spelled out rather than given as initials, and additional authors after the first in a multi-author source are given in the normal order of first name then last name.
- Two-author sources use "and" between them (not "&"), as well as between the penultimate and last author in sources with three or more authors.
- Titles are capitalized normally (not converted into sentence style), with prepositions, conjunctions, and articles all lowercase unless they're the first word in the title or subtitle.
- The titles of short works are surrounded by quotation marks; longer works are italicized just as in APA style.
- The year of publication comes at the end of a book reference following the publisher name and a comma.
 - If the book is republished, the original publication year appears following the title's period and ends with a period itself.
- The edition precedes the publisher name and is separated from the latter by a comma.
- The "http://" is omitted from URLs.

For more on MLA Works Cited conventions, see *MLA Works Cited Page: Basic Format* (Russell et al., 2017) and the pages following it.

References

Russell, T., Brizee, A., Angeli, E., Keck, R., Paiz, J. M., Campbell, M., Rodríguez-Fuentes, R., Kenzie,

D. P., Wegener, S., Ghafoor, M. (2017, October 23). MLA in-text citations: The basics. *Purdue OWL*. Retrieved from <https://owl.english.purdue.edu/owl/resource/747/02/>

Russell, T., Brizee, A., Angeli, E., Keck, R., Paiz, J. M., Campbell, M., Rodríguez-Fuentes, R., Kenzie, D. P., Wegener, S., Ghafoor, M. (2017, October 23). MLA works cited page: Basic format. *Purdue OWL*. Retrieved from <https://owl.english.purdue.edu/owl/resource/747/05/>

3.5.4: Citing and Referencing Sources in IEEE Style

The Institute of Electrical and Electronics Engineers (IEEE) documentation style is favoured by pure STEM (science, technology, engineering, and math) disciplines and is therefore second to APA in its prevalence in the College of Applied Arts and Technology system. Like APA and MLA, it features a two-part system of in-text citations used throughout and references tucked away at the end of a document, but streamlines the former even further to just a bracketed number. Citations are numbered in order of their appearance, as are the bibliographical entries at the back since they correspond to the bracketed numbers throughout the document. The first few sources used would be cited as such:

Direct or indirect quotation from the first source [1]. Direct or indirect quotation from a second source [2]. Direct or indirect quotation from the first source again [1]. Direct or indirect quotation from a third source [3].

Besides being citations, the bracketed numbers may also be used as substitutes for naming the source itself, as in the following signal phrase preceding a summary of several sources:

According to [12], [15], and [17]-[20], . . .

Bracketing the whole group of references (rather than each individually) is also acceptable (Murdoch University Library, 2018):

According to [12, 15, and 17-20], . . .

Page or paragraph references can also be inserted into the citations as they were in APA and MLA—e.g., [12, p. 4], [15, ¶ 7].

The list of bibliographical entries at the back of the document is called “References” like in APA, but its organization differs. Rather than list the entries alphabetically by author last name, IEEE lists them in order of their appearance throughout your text with a column of the bracketed citation numbers flush to the left margin. Consider the three sample sources used to compare and contrast bibliographical entries for APA and MLA style above, now in IEEE:

[1] W. Strunk and E. B. White, *Elements of Style*, 4th ed., Boston, MA: Allyn & Bacon, 2000.

[2] K. Wiens. (2012, July 20). I won't hire people who use poor grammar. Here's why. *Harv. Bus. Rev.* [Online]. Available: <https://hbr.org/2012/07/i-wont-hire-people-who-use-poo>. [Accessed: January 27, 2018].

[3] K. M. Dames, "Understanding plagiarism and how it differs from copyright infringement," *Comp. in Libr.*, vol. 27, no. 6, pp. 25-27, Jun., 2006.

The basic differences between IEEE-style References, APA, and MLA are as follows:

- The section title is "References" (like APA, but unlike MLA) left-aligned (unlike both) at the top of the page.
- Bibliographical entries are listed in their order of appearance with a column of bracketed numbers flush to the left margin (unlike both APA and MLA).
- Authors' first names are given as initials (like APA, unlike MLA) but placed *before* the last name (unlike both APA and MLA).
- Double authors are separated by "and" (like MLA), not "&" (APA).
- Long works are italicized (like APA and MLA), short works are in sentence style (like APA, unlike MLA), in plain style (like APA and MLA), and are in quotation marks for print-based periodicals (like MLA, unlike APA), but are not in quotation marks for strictly online articles (like APA, unlike MLA) according to the IEEE Editorial Style Manual (n.d.), but they are according to other style guides (Murdoch University Library, 2018), so this can be optional.
- Year/date of publication appears at the end for print sources (like MLA, unlike APA) but following the author for online sources (like APA, unlike MLA).
- Punctuation between parts is mostly commas for print sources (unlike both APA and MLA) and periods for online (like both APA and MLA).

When writing a document involving research in IEEE style, you are strongly advised to use a citation and references generator such as that available in MS Word. Begin one even when starting a project with notes by going to the "References" menu at the top and selecting "Insert Citation." Though the IEEE numbering system is reader friendly, documenting research manually, especially for larger projects with several sources, is difficult because adding references out of order during the writing process requires re-numbering all subsequent citations as well as their corresponding bibliographical entry numbers at the back. Say you're writing a 20-page report and realize that you need to add an extra source between [12] and [13], and you've already cited 26 sources; after inserting the new [13], you would have to manually change the old [13] to [14], [14] to [15], and 11 others both throughout your report and in your references at the back; if you added yet another source in the middle somewhere, you'll be re-numbering them all over again. A reference generator will re-number your references with the press of a button when adding citations out of order, as well as format your References list for you. Some stylistic adjustments will be necessary, however, due to differences between MS Word's References formatting and that modeled in the IEEE Editorial Style Manual (n.d.).

References

IEEE editorial style manual. (n.d.). Retrieved from https://www.ieee.org/conferences_events/conferences/publishing/style_references_manual.pdf

Murdoch University Library. (2018, January 18). IEEE style: Citing in the text. Retrieved from <http://libguides.murdoch.edu.au/IEEE/text>

3.5.5: Citing Images and Other Media

We've so far covered citations and references when using text, but what about other media? How do you cite an image or a video embedded in a presentation, for instance? A common mistake among students is to just grab whatever photos or illustrations they find in a Google image search, toss them into a presentation PowerPoint or other document, and be done with it. That would be classic plagiarism, however, since putting their name on an assignment that includes the uncredited work of others dishonestly presents other people's work as their own. To avoid plagiarism, the student would first have to determine if they're permitted to use the image then cite it properly.

Whether you've been granted permission, own the image yourself, or not, you must still credit the source of the image just like when you quote directly or indirectly. Not citing an image even in the case of owning it yourself will result in the reader thinking that you may have stolen it from internet. Just because a photo or graphic is on the internet doesn't mean that it's for the taking; any image is automatically copyrighted by the owner as soon as they produce it (e.g., you own the copyright to all the photos you take on your smartphone). Whether or not you can download and use images from the internet depends on both its copyright status and your purpose for using it. According to Canadian legislation, using images for educational purposes is considered "Fair Dealing" (i.e., safe) when you won't make any money on it (Copyright Act, 1985, §29), but contacting the owner and asking permission is still the safest course of action. Next safest is to ask your librarian if your use of an image in whatever circumstances might be considered offside or fair.

Standard practice in citing images in APA style is to refer to them in your text and then properly label them with figure numbers, captions, and copyright details. Referring to them in your text, referencing the figure numbers in parentheses, and placing the image as close as possible to that reference ensures that the image is relevant to your topic rather than a frivolous attempt to pad your research document with non-text space-filler. The image must be:

- Centred on the page and appropriately sized given its resolution (do not make low-resolution, pixelated images large), dimensions, and relative importance
- Labeled immediately below with a figure number given in a consecutive order along with other images in your document
- Described briefly with a caption that also serves as the image's title
- Attributed with original title, ownership, and retrieval information, including the URL if found online, as well as copyright status information, such as "Copyright 2007 by Larissa Sayer. Printed with permission" (Thompson, 2017).

Even if you retrieve the image from public domain archives such as the Wikimedia Commons (see Figure 1), you must indicate that status along with the other information outlined above and illustrated below.



Figure 1. Algonquin couple of the *Kitcisipiriniwak* ("Ottawa River Men") encountered by the French on an islet on the Ottawa River. From "Algonquines," watercolour by an unknown 18th-century artist, <https://upload.wikimedia.org/wikipedia/commons/3/3a/Algonquins.jpg>. Public domain (2008) courtesy of the City of Montreal Records Management & Archives, Montreal, Canada.

If your document is a PowerPoint or other type of presentation, however, which doesn't give you much room for 2-4 lines of citation information without compromising clarity by minimizing its size, a more concise citation more like that you would do for directly or indirectly quoted text might be more appropriate. The citation below an image on a PowerPoint slide could thus look more like:



Source: “Algonquines” (2008)

In either case, the References at the end of the paper or slide deck would have a proper APA-style bibliographical entry in the following format:

Creator’s last name, first initial. (Role of creator). (Year of creation). Title of image or description of image. [Type of work]. Retrieved from URL/database

If the identity of the creator is not available and year of creation unknown, as in the above case, the title moves into the creator/owner’s position and the date given is when the image was posted online:

Algonquines. (2008, August 19). [Digital Image]. Retrieved from https://en.wikipedia.org/wiki/Algonquin_people#/media/File:Algonquins.jpg

A common mistake is to identify “Google Images” as the source, but it’s a search engine, not a source, and doesn’t guarantee that the reader will be able to find the source you used. By having either that actual owner/author or title in the citation and the matching owner/author as the first word in the References section, you make it easy for the reader to go directly to the source you used, which is the whole point of the two-part citation/reference system.

For more, see the Simon Fraser University Library website’s guide Finding and using online images (Thompson, 2017) for a collection of excellent databases and other websites to locate images, detailed instructions for how to cite images in APA and MLA style, and information on handling copyrighted material. Though the *IEEE Editorial Style Manual* omits a section on citing images, the University of Manitoba’s Citation Guide – IEEE Style shows that the label below the image looks puts the figure number in uppercase along with the title caption, and replaces everything else with just the bracketed in-text citation number:



FIGURE 1. ALGONQUIN COUPLE [4]

In the References at the back, the IEEE figure would appear as:

[4] “Algonquines” [Online]. (2008, August 19). Available: https://en.wikipedia.org/wiki/Algonquin_people#/media/File:Algonquins.jpg. [Accessed: January 27, 2018].

For more on citing images in IEEE, as well as further examples of all other source types, see Citation Guide – IEEE Style (Godavari, 2008).

For citing and referencing an online video such as from *YouTube*, you would just follow the latest guidelines from the official authority on each style such as APAStyle.org. Citing these is a little tricky because *YouTube* users often post content they don’t own the copyright to. If that’s the case, you would indicate the actual author or owner in the author position as you would for anything else, but follow it with the user’s screen name in brackets. If the author and the screen name are the same, you would just go with the screen name in the author position. For a video on how to do this exactly, for instance, you would cite the screen given under the video in *YouTube* as the author, followed by just the year (not the full date) indicated below the screen name following “Published on” (James B. Duke, 2017). In the References section, “[Video file]” follows the video’s italicized, sentence-style title, and the bibliographical reference otherwise looks like any other online source:

James B. Duke. (2017, January 13). How to cite Youtube videos in APA format [Video file]. Retrieved from <https://www.youtube.com/watch?v=ydJ7k1ix-p8>

Whenever in doubt about what style to follow, especially as technology changes, always consult the relevant authority on whatever source medium you need to cite and reference. If you doubt the James B. Duke Memorial Library employee’s video above, for instance, you can verify the information at APAStyle.org and see that it indeed is accurate advice (McAdoo, 2011).

Key Takeaways



Cite and reference each source you use in a research document following the documentation style conventions adopted by your field of study, whether APA, MLA, or IEEE.

Exercises



Drawing from your quotation, paraphrase, and summary exercises at the end of §3.4, assemble a combination of each, as well as media such as a photograph and a YouTube video, into a short research report on your chosen topic with in-text citations and bibliographical entries in the documentation style (APA, MLA, or IEEE) adopted by your field of study.

References

Copyright Act (R.S.C., 1985, c. C-42, amended June 19, 2017). Retrieved from the Justice Laws Website: <http://laws-lois.justice.gc.ca/eng/acts/c-42/>

Godavari, S. N. (2008, September). Citation Guide – IEEE style. Retrieved from <https://www.umanitoba.ca/faculties/engineering/departments/mechanical/pdf/Citing-IEEE.pdf>

James B. Duke. (2017, January 13). *How to cite Youtube videos in APA format* [Video file]. Retrieved from <https://www.youtube.com/watch?v=ydJ7k1ix-p8>

McAdoo, T. (2011, October 27). How to create a reference for a YouTube video. *APA Style*.

Retrieved from <http://blog.apastyle.org/apastyle/2011/10/how-to-create-a-reference-for-a-youtube-video.html>

Murdoch University Library. (2018, January 18). IEEE style: Citing in the text. Retrieved from <http://libguides.murdoch.edu.au/IEEE/text>

Thompson, J. (2017, September 26). Finding and using online images: Citing. *Library*. Retrieved from <https://www.lib.sfu.ca/help/research-assistance/format-type/online-images/citing>

CHAPTER 4: THE WRITING PROCESS III: DRAFTING

Jordan Smith

Chapter Learning Objectives

1. Use effective reading strategies to collect and reframe information from a variety of written materials accurately.
2. Apply outlining techniques to begin drafting a document.
3. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
4. Apply the principles of reader-friendly document design to various written formats.

Now that you've planned out your document and gathered information that meets your audience's needs, you're just about ready to start drafting the document's message. At this point it's worthwhile reminding yourself that the words you start entering in your word processor will look different from those your reader will eventually read. By the end of the drafting stage examined in this chapter, your document will be partway there, but how much revising you do in the fourth stage (see Ch. 5) depends on how effectively you've organized your message in the first step of this third stage.

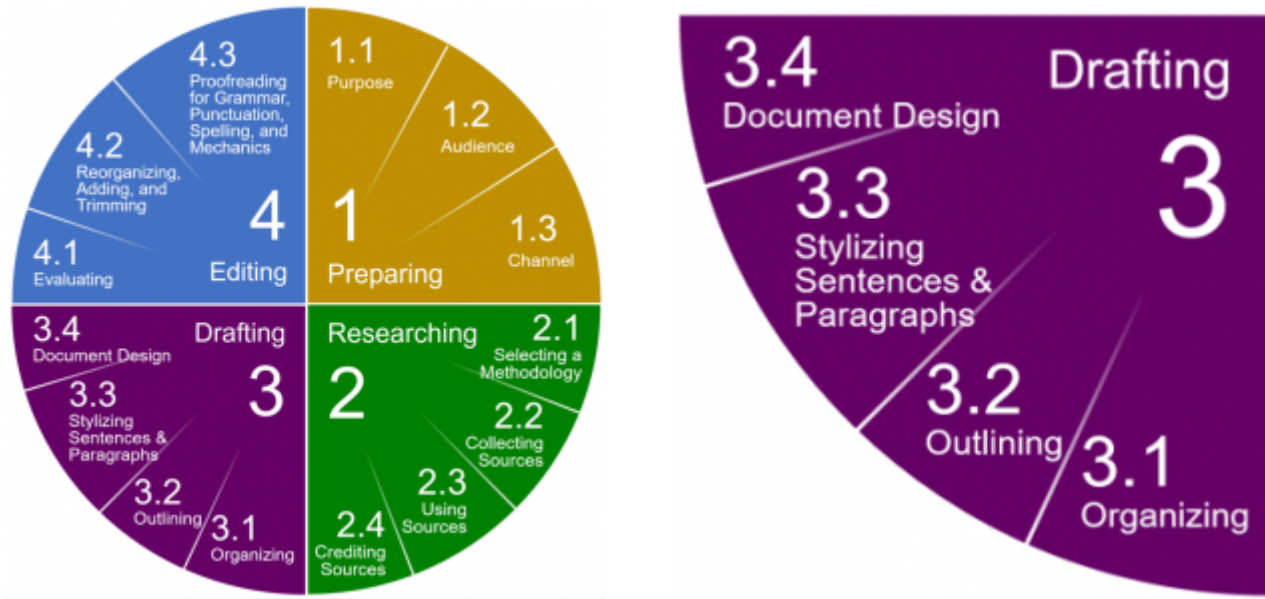


Figure 4: The four-stage writing process and Stage 3 Breakdown

- 4.1: Choosing an Organizational Pattern
- 4.2: Outlining Your Message
- 4.3: Forming Effective Sentences
- 4.4: Forming Effective Paragraphs
- 4.5: Writing in the Business Standard Style
- 4.6: Effective Document Design

4.1: CHOOSING AN ORGANIZATIONAL PATTERN

Learning Objectives



1. Use effective reading strategies to collect and reframe information from a variety of written materials accurately.
3. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

The shape of your message depends on the purpose you set out to achieve, which is why we said in §2.1 above that a clearly formulated purpose must be kept in mind throughout the writing process. Whether your purpose is to inform, instruct, persuade, or entertain, structuring your message according to set patterns associated with each purpose helps achieve those goals. Without those familiar structures guiding your reader toward the intended effect, your reader can get lost and confused, perhaps reflecting the confusion in your own mind if your thoughts aren't clearly focused and organized enough themselves. Or perhaps your message is crystal clear in your own mind, but you articulate it in an unstructured way that assumes your reader sees what you think is an obvious main point. Either way, miscommunication results because your point gets lost in the noise. Lucky for us, we have standard patterns of organization to structure our thoughts and messages to make them understandable to our audiences.

From paragraphs to essays to long reports, most messages follow a three-part structure that accommodates the three-part division of our attention spans and memory:

1. Attention-grabbing **opening**

- The job of the opening is to hook the reader in to keep reading, capturing their attention with a major personal takeaway (answering the reader's question "What's in it for me?") or the main point (thesis) of the message. In longer messages, the opening includes an introduction that establishes the frame in

which the reader can understand everything that follows.

- This accommodates the **primacy effect** in psychology, which is that first impressions tend to stick in our long-term memory more than what follows (Baddeley, 2000, p. 79), whether those impressions are of the people we meet or the things we read. You probably remember what a recently made friend at college looked like and said the first time you met them, for instance, despite that happening weeks or even months ago. Likewise, you will recall the first few items you read in a list of words (like those in Table 2.2.3 above) better than those in the middle. This effect makes the first sentence you write in a paragraph or the first paragraph you write in a longer message crucial because it will be what your reader remembers most and the anchor for their understanding of the rest. Because of the way our minds work, your first sentence and paragraph must represent the overall message clearly.

2. Detail-packed **body**

- The message body supports the opening with further detail supporting the main point. Depending on the type of message and organizational structure that suits it best, the body may involve:
 - Evidence in support of a thesis
 - Background for better understanding
 - Detailed explanations and instructions
 - Convincing rationale in a persuasive message
 - Plot and character development in an entertaining story

This information is crucial to the audience's understanding of and commitment to the message, so it cannot be neglected despite the primacy and recency effects.

- Our memory typically blurs these details, however, so having them written down for future reference is important. You don't recall the specifics of *every* interaction with your closest friend in the days, months, and years between the strong first impression they made on you and your most recent memory of them, but those interactions were all important for keeping that relationship going, and certainly some highlight memories from throughout that intervening time come to mind. Likewise, the message body is a collection of important subpoints in support of the main point, as well as transitional elements that keep the message coherent and plot a course towards its completion.

3. Wrap-up and transitional **closing**

- The closing completes the coverage of the topic and may also point to what's next, either by bridging to the next message unit (e.g., the concluding sentence of a paragraph establishes a connection to the topic of the next paragraph) or offering cues to what action should follow the message (e.g., what the reader is

supposed to do in response to a letter, such as reply by a certain date).

- Depending on the size, type, and organizational structure of the message, the closing may also offer a concluding summary of the major subpoints made in the body to ensure that the purpose of the message has been achieved. In a persuasive message, for instance, this summary helps prove the opening thesis by confirming that the body of evidence and argument supported it convincingly.
- The closing appeals to what psychologists call the **recency effect**, which is that, after first impressions, last impressions stick out because, after the message concludes, we carry them in our short-term memory more clearly than what came before (Baddeley, 2000, p. 79). Just as you probably remember your most recent interaction with your best friend—what they were wearing, saying, feeling, etc.—so you remember well how a message ends.

The effective writer therefore loads the message with important points both at the opening and closing because the reader will focus on and remember what they read there best, as well as organizes the body in a manner that is engaging and easy to follow. In the next section, we will explore some of the possibilities for different message patterns while bearing in mind that they all follow this general three-part structure. Learning these patterns is valuable beyond merely being able to write better. Though a confused and scattered mind produces confusing and disorganized messages, anyone can become a more clear and coherent *thinker* by learning to organize messages consistently according to well-established patterns.

- 4.1.1: Direct Messages
- 4.1.2: Indirect Messages
- 4.1.3: Organizing Principles

4.1.1: Direct Messages

Because we're all going to die and life is short, most messages do their reader a solid favour by taking the direct approach or frontloading the main point, which means getting right to the point and not wasting precious time. In college and in professional situations, no one wants to read or write more than they have to when figuring out a message's meaning, so everybody wins when you open with the main point or thesis and follow with details in the message body. If it takes you a while before you find your own point in the process of writing, leaving it at the end where you finally discovered what your point was, or burying it somewhere in the middle, will frustrate your reader by forcing them to go looking for it. If you don't move that main point by copying, cutting, and pasting it at the very beginning, you risk annoying your busy reader because it's uncomfortable for them to start off in the weeds and linger in a state of confusion until they finally find that main point later. Leaving out the main point because it's obvious to you—though it isn't at all to the reader coming to the topic for the first time—is another common writing error. The writer who frontloads their

message, on the other hand, finds themselves in their readers' good graces right away for making their meaning clear upfront, freeing up readers to move quickly through the rest and on to other important tasks in their busy lives.

Whether or not you take the direct approach depends on the effect your message will have on the reader. If you anticipate your reader being interested in the message or their attitude to it being anywhere from neutral to positive, the direct approach is the only appropriate organizational pattern. Except in rare cases where your message delivers bad news, is on a sensitive topic, or when your goal is to be persuasive (see §4.1.2 below), all messages should take the direct approach. Since most business messages have a positive or neutral effect, all writers should frontload their messages as a matter of habit unless they have good reason to do otherwise. The three-part message organization outlined in the §4.1 introduction above helps explain the psychological reasons why frontloading is necessary: it accommodates the reader's highly tuned capacity for remembering what they see first, as well as respects their time in achieving the goal of communication, which is understanding the writer's point.

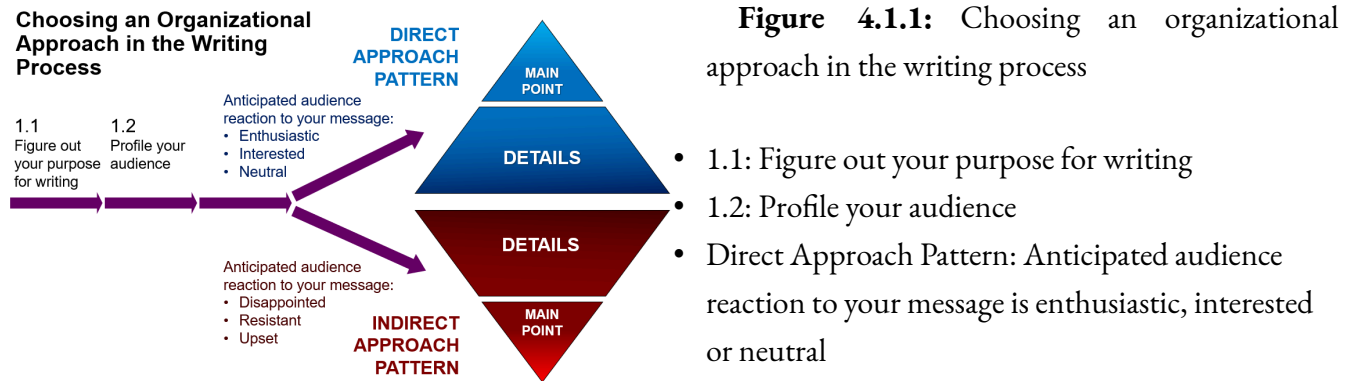
Let's say, for instance, that you send an email to a client with e-transfer payment instructions so that you can be paid for work you did for them. Because you send this same message so often, the objective and context of this procedure is so well understood by you that you may fall into the trap of thinking that it goes without saying, so your version of "getting to the point" is just to open with the payment instructions. Perhaps you may have even said in a previous email that you'd be sending payment instructions in a later email, so you think that the reader knows what it's about, or you may get around to saying that this is about paying for the job you did at the end of the email, effectively burying it under a pile of details. Either way, to the reader who opens the email to see a list of instructions for a procedure they've never done before with no explanation as to why they need to do this and what it's all for exactly, confusion abounds. At best the client will email you back asking for clarification; at worst they will just ignore it, thinking that it was sent in error and was supposed to go to someone who would know what to do with it. You'll have to follow up either way, but you have better things to do. If you properly anticipated your audience's reaction and level of knowledge as discussed in Step 1.2 of the writing process (see §2.2.4 above), however, you would

know that opening with a main point like the following would put your client in the proper frame of mind for following the instructions and paying you on time:

Please follow the instructions below for how to send an e-transfer payment for the installation work completed at your residence on July 22.

In the above case, the opening's main point or central idea is a polite request to follow instructions, but in other messages it may be a **thesis** statement, which is a summary of the whole argument; in others it may be a question or request for action. The **main point** of any message, no matter what type or how long, should be an idea that you can state clearly and concisely in one complete sentence if someone came up to you and asked you what it's all about in a nutshell. Some people don't know what their point is exactly when they start writing, in which case writing is an exploratory exercise through the evidence assembled in the research stage. As they move toward such a statement in their conclusion, however, it's crucial that they copy, cut, and paste that main

point so that it is among the first—if not *the* first—sentence the reader sees at the top of the document, despite being among the last written.



1. Main Point
2. Details

- Indirect Approach Pattern: Anticipated audience reaction to your message is disappointed, resistant or upset

1. Details
2. Main Point

4.1.2: Indirect Messages

While the direct approach leads with the main point, the indirect approach strategically buries it deeper in the message when you expect that your reader will be resistant to it, displeased with it, upset or shocked by it, or even hostile towards it. In such cases, the direct approach would come off as overly blunt, tactless, and even cruel by hitting the reader over the head with it in the opening. The goal of indirect messages is not to deceive the reader nor make a game of finding the main point, but instead to use the opening and some of the message body to ease the reader towards an unwanted or upsetting message by framing it in such a way that the reader becomes interested enough to read the whole message and is in the proper mindset for following through on it. This organizational pattern is ideal for two main types of messages: those delivering bad news or addressing a sensitive subject, and those requiring persuasion such as marketing messages pitching a product, service, or even an idea. Both types are the focus of the two final sections of Chapter 9 respectively (see §9.4 and §9.5).

For now, however, all we need to know is that the organization of a persuasive message follows the so-called **AIDA** approach, which divides the message body in the traditional three-part organization into two parts, making for a four-part structure:

1. **Attention**-grabbing opener

2. **Interest**-generating follow-up
3. **Desire**-building details
4. **Action** cue

Nearly every commercial you’ve ever seen follows this general structure, which is designed to keep you interested while enticing you towards a certain action such as buying a product or service. If a commercial took the direct approach, it would say upfront “Give us \$19.99 and we’ll give you this turkey,” but you never see that. Instead you see all manner of techniques used to grab your attention in the opening, keep you tuned in through the follow-up, pique your desire in the third part, and get you to act on it with purchasing information at the end. Marketing relies on this structure because it effectively accommodates our attention spans’ need to be hooked in with a strong first impression and told what to do at the end so that we remember those details best, while working on our desires—even subconsciously—in the two-part middle body.

Likewise, a bad-news message divides the message body into two parts with the main point buried in the second of them (the third part overall), with the opening used as a hook that delays delivery of the main point and the closing giving action instructions as in persuasive AIDA messages. The typical organization of a bad-news message is:

1. **Buffer** offering some good news, positives, or any other reason to keep reading
2. **Reasons** for the bad news about to come
3. **Bad news** buried and quickly deflected towards further positives or alternatives
4. **Action** cue

Delaying the bad news till the third part of the message manages to soften the blow by surrounding it with positive or agreeable information that keeps the audience reading so that they miss neither the bad news nor the rest of the information they need to understand it. If a doctor opened by saying “You’ve got cancer and probably have six months to live,” the patient would probably be reeling so much in hopelessness from the death-sentence blow that they wouldn’t be in the proper frame of mind to hear important follow-up information about life-extending treatment options. If an explanation of those options preceded the bad news, however, the patient would probably walk away with a more hopeful feeling of being able to beat the cancer and survive. Framing is everything when delivering bad news.

Consider these two concise statements of the same information taking both the direct and indirect approach:

Table 4.1.2: Comparison of Direct and Indirect Messages

Direct Message	Indirect Message
Global Media is cutting costs in its print division by shutting down several local newspapers.	Global Media is seeking to improve its profitability across its various divisions. To this end, it is streamlining its local newspaper holdings by strengthening those in robust markets while redirecting resources away from those that have suffered in the economic downturn and trend towards fully online content.

Here we can see at first glance that the indirect message is longer because it takes more care to frame and justify the bad news, starting with an opening that attempts to win over the reader's agreement by appealing to their sense of reason. In the direct approach, the bad news is delivered concisely in blunt words such as "cutting" and "shutting," which get the point across economically but suggest cruel aggression with violent imagery. The indirect approach, however, makes the bad news sound quite good—at least to shareholders—with positive words like "improve," "streamlining," and "strengthening." The good news that frames the bad news makes the action sound more like an angelic act of mercy than an aggressive attack. The combination of careful word choices and the order in which the message unfolds determines how well it is received, understood, and remembered as we shall see when we consider further examples of persuasive and bad-news messages later in §9.4 and §9.5.

4.1.3: Organizing Principles

Several message patterns are available to suit your purposes for writing in both direct and indirect-approach message bodies, so choosing one before writing is essential for staying on track. Their formulaic structures make the job of writing as easy and routine as filling out a form—just so long as you know which form to grab and have familiarized yourself with what they look like when they're filled out. Examples you can follow are your best friends through this process. By using such organizing principles as chronology (a linear narrative from past to present to future), comparison-contrast, or problem-solution, you arrange your content in a logical order that makes it easy for the reader to follow your message and buy what you're selling.

If you undertake a large marketing project like a website for a small business, it's likely that you'll need to write pieces based on many of the available organizing principles identified, explained, and exemplified in Table 4.1.3 below. For instance, you might:

- Introduce the product or service with a **problem-solution** argument on the homepage
- Include a history of the company told using the **chronological** form as well as the journalistic **5W+H** (who, what, where, when, why, and how) breakdown on the *About* page; you may also include short biographies of key staff

- Use technical descriptions and a **comparison-contrast** structure for product or service explanations that distinguish what you offer from your competitors
- Provide short research articles or essays on newsworthy topics related to your business in the **general-to-specific** pattern on the *Blog* page
- Provide point-pattern questions and answers on the *FAQ* page, such as the **pros and cons** of getting a snow-removal service in answer to the question of whether to pay someone to do it for you
- Provide **instructions** for setting up service on the *Contact* page

Checking out a variety of websites to see how they use these principles effectively will provide a helpful guide for how to write them yourself. So long as you don't plagiarize their actual wording (see §3.5.1 above for why you mustn't do this and §3.4.2 for how to avoid it), copying their basic structure so you don't have to reinvent the wheel means that you can provide readers with a recognizable form that will enable them to find the information they need.

Table 4.1.3: Ten Common Organizing Principles

Organizing Principle	Structure & Use	Example
1. Chronology & 5W+H	<ul style="list-style-type: none"> • Linear narrative from beginning to end, including past, present, and possibly future, as well as the who, what, where, when, and how of the story • For historical accounts, incident reports, and biographies 	<p>Wolfe Landscaping & Snowblowing began when founder Robert Wolfe realized in 1993 that there was a huge demand for <u>reliable</u> summer lawn care and winter snow removal when it seemed that the few other available services were letting their customers down. Wolfe began operations with three snow-blowing vehicles in the Bridlewood community of Kanata and expanded to include the rest of Kanata and Stittsville throughout the 1990s.</p> <p>WLS continued its eastward expansion throughout the 2000s and now covers the entire capital region as far east as Orleans, plus Barrhaven in the south, with 64 snow-blowing vehicles out on the road at any one time. WLS recently added real-time GPS tracking to its app service and plans to continue expanding its service area to the rural west, south, and east of Ottawa throughout the 2020s.</p>
2. Comparison & Contrast	<ul style="list-style-type: none"> • Point-by-point account of the similarities between two or more things, followed by a similarly structured account of their differences • For descriptive analysis of two or more somehow related things 	<p>Wolfe Snowblowing goes above and beyond what its competitors offer. While all snowblowing services will send a loader-mount snow blower (LMSB) to your house to clear your driveway after a big snowfall, Wolfe's LMSBs closely follow the city plow to clear your driveway and the snow bank made by the city plow in front of it, as well as the curbside area in front of your house so you still have street parking.</p> <p>If you go with the "Don't Lift a Finger This Winter" deluxe package, Wolfe will additionally clear and salt your walkway, stairs, and doorstep. With base service pricing 10% cheaper than other companies, going with Wolfe for your snow-removal needs is a no-brainer.</p>

3. Pros & Cons

- Account of advantages followed by disadvantages
- For an analysis of something's value as a basis for a recommendation to either adopt it or not

Why would you want a snow-removal service?

Advantages include:

- Worry-free driveway clearing following the city plow
- Round-the-clock service clearing your driveway before you leave for work and before you return
- Time saved from shoveling your driveway yourself
- Avoiding the injuries incurred from shoveling yourself

The disadvantages of other snow-removal services include:

- 10% more expensive than our base price
- Potential damage to your driveway or adjoining lawn (WLS will fix any damage free of charge)

As you can see, the advantages of WLS outweigh the disadvantages for any busy household.

4. Problem & Solution

- Description of a problem scenario followed by a solution that directly solves that problem
- For marketing products or services and scientific reporting of breakthroughs

Are you fed up with getting all geared up in -40 degree weather at 6am to shovel your driveway before leaving for work? Fed up with finishing shoveling the driveway in a hurry, late for work in the morning, and then the city plow comes by and snow-banks you in just as you're about to leave? Fed up with coming home after a long, hard day at work only to find that the city plow snow-banked you out?

Well worry no more! Wolfe Landscaping & Snowblowing has got you covered with its 24-hour snow removal service that follows the city plow to ensure that you always have driveway access throughout the winter months.

5. Cause & Effect	<ul style="list-style-type: none"> • Detailed description of the connection between two or more events, actions, or things to show how they work • For an analysis of the causal connection between things 	<p>As soon as snow appears in the weather forecast, Wolfe Landscaping & Snowblowing reserves its crew of dedicated snow blowers for 24-hour snow removal. When accumulation reaches 5cm in your area, our fleet deploys to remove snow from the driveways of all registered customers before the city plows get there. Once the city plow clears your street, a WLS snow blower returns shortly after to clear the snow bank formed by the city plow at the end of your driveway.</p>
6. Process & Procedure	<ul style="list-style-type: none"> • Numbered list describing steps in a chronological sequence of actions towards a goal • For an analysis of how something works, or instructions for performing a certain task 	<p>Ordering our snow removal service is as easy as 1 2 3:</p> <ol style="list-style-type: none"> 1. Call 1-800-555-SNOW or email us at info@wolfelandscaping&snow 2. Let us know your address and driveway size (can it fit only one parked car, two end-to-end or side-by-side, four, etc.?) 3. Pay by credit card over the phone or via our secure website, and we will come by to plant driveway markers within the week. That way, our snow blowers will be able to respect your driveway boundaries throughout the winter clearing season.
7. General to Specific	<ul style="list-style-type: none"> • Starts with the bigger picture as context before narrowing the focus to something very specific • For an in-depth analysis or explanation of a topic 	<p>Wolfe Landscaping & Snowblowing provides a reliable snow-removal service throughout the winter. We got you covered for any snowfall of 5cm or more between November 1st and April 15th. Once accumulation reaches 5cm at any time day or night, weekday or weekend, holiday or not, we send out our fleet of snow blowers to cover neighbourhood routes, going house-by-house to service registered customers. At each house, a loader-mount snow blower scrapes your driveway and redistributes the snow evenly across your front yard in less than five minutes.</p>

8. Definition & Example	<ul style="list-style-type: none"> Starts with a definition and provides specific examples for illustration For explaining concepts to people coming to the topic for the first time 	A loader-mount snow blower (LMSB) is a heavy-equipment vehicle that removes snow from a surface by pulling it into a front-mounted impeller with an auger and propelling it out of a top-mounted discharge chute. Our fleet consists of green John Deere SB21 Series and red M-B HD-SNB LMSBs.
9. Point Pattern	<ul style="list-style-type: none"> A bullet-point listing of various connected but unprioritized points supporting a main point preceding them For breaking down an explanation in a reader-friendly point-by-point presentation such as an FAQ page 	<p>Wolfe Landscaping & Snowblowing's "Don't Lift a Finger This Winter" deluxe package ensures that you will always find your walkway and driveway clear when you exit your home after a snowfall this winter! It includes:</p> <ul style="list-style-type: none"> Clearing and salting your driveway with every 3cm or more of snow accumulation Clearing the snowbank at the end of your driveway within minutes of it being formed by the city plow Shoveling and salting your walkway all the way to your front door after a 3cm+ snowfall or freezing rain Shoveling by request any other walkways on your property
10. Testimonial	<ul style="list-style-type: none"> First-person account of an experience For offering a perspective that the reader can relate to as if they were to experience it themselves 	<p>According to Linda Sinclair in the Katimavik neighbourhood, "Wolfe did a great job clearing our snow this past winter. We didn't see them much because they were always there and gone in a flash, but the laneway was always scraped clear by the time we left for work in the morning if it snowed in the night. We never had a problem when we got home either, unlike when we used Sherman Snowblowing the year before and we always had to stop, park on the street, and shovel the snow bank made by the city plow whenever it snowed while we were at work. Wolfe was the better service by far."</p>

Though shorter documents may contain only one such organizing principle, longer ones typically involve a mix of different organizational patterns used as necessary to support the document's overall purpose.

Key Takeaways



Before beginning to draft a document, let your purpose for writing and anticipated audience reaction determine whether to take a direct or indirect approach, and choose an appropriate organizing principle to help structure your message.

Exercises



1. Consider some good news you've received recently (or would like to receive if you haven't). Assuming the role of the one who delivered it (or who you would like to deliver it), write a three-part direct-approach message explaining it to yourself in as much detail as necessary.
2. Consider some bad news you've received recently (or fear receiving if you haven't). Write a four-part indirect-approach message explaining it to yourself as if you were the one delivering it.
3. Draft a three-paragraph email to your boss (actual or imagined) where you recommend purchasing a new piece of equipment or tool. Use the following organizational structure:
 - i. Frontload your message by stating your purpose for writing directly in the first sentence or two.
 - ii. Describe the problem that the tool is meant to address in the follow-up paragraph.
 - iii. Provide a detailed solution describing the equipment/tool and its action in the third paragraph.
4. Picture yourself a few years from now as a professional in your chosen field. You've been employed and are getting to know how things work in this industry when an opportunity to branch out on your own presents itself. To minimize start-up costs, you do as much of the work as you can manage yourself, including the marketing and promotion. To this end, you figure out how to put together a website and write the content yourself. For this exercise, write a piece for each of the ten organizing principles explained and exemplified in Table 4.1.3 above and about the same length as each, but tailored to suit the products and/or services you will be offering in your chosen profession.

References

Baddeley, A. (2000). Short-term and working memory. In E. Tulving & F. I. M. Craik (Eds.) *The Oxford Handbook of Memory* (pp. 77-92). New York: Oxford University Press. Retrieved from <https://books.google.ca/books?id=DOYJCAAAQBAJ>

4.2: OUTLINING YOUR MESSAGE

Learning Objectives



1. Use effective reading strategies to collect and reframe information from a variety of written materials accurately.
2. Apply outlining techniques to begin drafting a document.
3. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Once you've clarified the organizing principle of your message, outlining with hierarchical notes helps you plot out the bare-bones structure of the message's full scope so that you can flesh it out into full sentences and paragraphs shortly after. Outlining helps you get past one of the most terrifying moments in any student's or professional's job, especially when beginning a large writing project: writer's block. Even after completing all the other steps of the writing process explored above, freezing up while staring down a blank screen is an anxiety-driven mental bottleneck that often comes from either lacking anything to say because you haven't researched the topic, or thinking that your draft writing has to come out perfectly just as the reader will see it by the end of the process. It absolutely doesn't. Drafting is supposed to produce a sketchy, disappointing mess only because the goal at this stage is to get ideas down fast so that you can fix them up later in the editing stage.

Outlining is a structured brainstorming activity that helps keep you on track by assigning major, overarching ideas and relatively minor, supporting points to their proper places in the framework of your chosen organizing principle. At its most basic form for a three-part message, an outline looks like the following:

- I. Opening
 - A. Point 1
 - B. Point 2
- II. Body
 - A. Point 1
 - 1. Subpoint 1

- 2. Subpoint 2
 - i. Sub-subpoint 1
 - ii. Sub-subpoint 2
 - a. Sub-sub-subpoint 1
 - b. Sub-sub-subpoint 2
 - c. Sub-sub-subpoint 3
 - iii. Sub-subpoint 3
- 3. Subpoint 3
- B. Point 2
 - 1. Subpoint 1
 - 2. Subpoint 2
 - 3. Subpoint 3
- III. Closing
 - A. Point 1
 - B. Point 2

You can add further points in the body and, as shown in the middle of the above outline template, subdivide them even further with lowercase roman numerals, regular numbers, lowercase letters, etc. depending on the size of the document and the support needed. Even when drafting a short email, throwing down a few point-form words as soon as you think of them, arranged in the basic three-part message structure, can help you get started, especially if you don't have time to write the full email as soon as you think of it (or respond to one as soon as you read it) but nonetheless need to get some quick ideas down before you forget so that you can expand on those points later when you have time. For instance, if it occurs to you that subscribing to a snow-removal service might be a good idea and quickly draft an email on the weekend while doing several other winterizing chores, it may look like the one in the left column of Table 4.2a below.

Table 4.2a: Brief Message Outline as a Basis for an Email Draft

Message Outline	Email Message Draft
	Greetings! I am interested in your snow-removal service this winter.
1. Interested	
2. Our details	We're at 5034 Tofino Crescent, and our driveway can fit four cars, so how much would that come to for the prepaid service?
a. address	
b. driveway	Alternatively, if we decide to do the snow removal ourselves for most of the winter but are in a jam at some point, is it possible to call you for one-time snow removal? How much would that be? Also, do you offer any discounts for first-time customers?
3. Questions:	
a. prepaid cost vs. one-time?	
b. discounts?	Warm regards, Christine Cook

However numbered, the hierarchical structure of these notes is like the scaffolding that holds you up as you construct a building from the inside out, knowing that you will just remove that scaffolding when its exterior is complete. Once the outline is in place, you can likewise just delete the numbering and flesh out the points into full sentences, such as those in the email message in the second column of Table 4.2a above, as well as add the other conventional email message components (see §6.1 below).

The specific architecture of the outline depends on the organizing principle you've chosen as appropriate for your writing purpose. In the case of the 10 common organizing principles used throughout the Wolfe Landscaping & Snowblowing website example in Table 4.1.3 above, Table 4.2b below shows how the outline for each of the first three principles keeps each piece organized prior to being fleshed out into sentences.

Table 4.2b: Outline Possibilities Based on Organizing Principles

Organizing Principle	Outline
1. Chronology & 5W+H	<ul style="list-style-type: none"> I. Past <ul style="list-style-type: none"> A. Founding: who, when, what, and why B. Origin and expansion: where, when, and how II. Present <ul style="list-style-type: none"> A. Coverage: where B. Technology: what III. Future: where and when
2. Comparison & Contrast	<ul style="list-style-type: none"> I. Thesis: Wolfe is better than the competition II. Body: Comparison-Contrast <ul style="list-style-type: none"> A. Comparison: what all companies do—clear your driveway B. Contrast: how Wolfe does it better <ul style="list-style-type: none"> i. Follows the city plow ii. Does your street parking iii. Offers walkway shoveling and salting iv. 10% cheaper for base service III. Conclusion: Wolfe wins, no contest!
3. Pros & Cons	<ul style="list-style-type: none"> I. FAQ: Why get snow removal? II. Pros & Cons <ul style="list-style-type: none"> A. Advantages <ul style="list-style-type: none"> i. professional driveway clearing ii. 24/7 service iii. saves time iv. avoids injury B. Disadvantages <ul style="list-style-type: none"> i. expense ii. potential property damage III. Concluding recommendation: get the service

As we shall see later in §11.1, outlining is key to organizing other projects such as presentations. If your task is to do a 20-minute presentation, preparing for it involves outlining your topic so that you can plot out the full scope of your speech, then fleshing out that outline into a coherent script with smooth transitions linking each point and subpoint. If it takes you 15 minutes to read that first version of the script out loud, then you simply add a third more material in the form of points in areas that need more development in your outline, then script them out into five more minutes of speech. But if it takes a half hour to read the first version of the script,

then you know that you need to pare it down, chopping about a third of its length. Outlining and scripting prior to building a PowerPoint for a 20-minute presentation that would take you a half hour to present would save you the time of making slides for material that would have to be cut out anyway. In this way, outlining keeps you on track to prevent wasted efforts.

Key Takeaways



Begin your draft by outlining the major and minor points in a framework based on the organizing principle appropriate for your purpose so that you can flesh it out into full draft sentences after.

Exercises



1. Find a sample article or document and break it down into a hierarchically structured outline with brief points for each level of organization. Follow the numbering divisions in the outline template given at the beginning of this section. Does this help you understand the structure of the message that you otherwise didn't consider but nonetheless relied on to understand it?
2. Outline your next substantial email (i.e., more than a hundred words in length) using hierarchical notes following the structure given at the beginning of this section. Does doing so offer any advantages to approaching the writing process without a plan?

4.3: FORMING EFFECTIVE SENTENCES

Learning Objectives



3. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Once you've put words on the screen with research material and outlined the shape of your content with point-form notes, building around that research and fleshing out those notes into correct English sentences should be quick and dirty composition—"quick" because speed-typing helps get your thoughts down almost as soon as they occur to you, and "dirty" because it's fine if those typed-out thoughts are garbage writing rife with errors. A talented few might be able to think and draft in perfectly correct sentences, but that's not our goal at this stage.

As long as you clean it all up later, what's important during the drafting stage is that you get your ideas down quickly to avoid losing any in the nitty-gritty bog of perfectionist composition. If you're still working on speeding up your typing (it can be a lifelong process!), however, consider using your smartphone's voice recorder to capture what you want to say out loud, then transcribe it into somewhat proper sentences by playing it back sentence by sentence. Correcting that writing as you draft is a waste of time because, in the first substage of editing (see §5.1 below), you may find yourself deleting whole sentences and even paragraphs that you meticulously perfected at the drafting stage. As we shall see in Chapter 5, scrupulously proof-editing for spelling, grammar, and mechanical errors—as well as the finer points of style—should be one of your final tasks in the whole writing process. At this stage, however, you at least need some sentences to work with.

Fashioning effective sentences requires an understanding of sentence structure. Now, the eyes of many native English speakers glaze over as soon as English grammar terminology rears its head. But think of it this way: to survive as a human being you must take care of your health, which means occasionally going to the doctor for help with the injuries and conditions that inevitably afflict you; to understand these, you listen to your doctor's explanations of how they work in your body, and you add to your vocabulary anatomical terms and processes—words you didn't need for those processes to function when you were healthy. Now that you need to work to improve your health, however, you need that technical understanding to know how

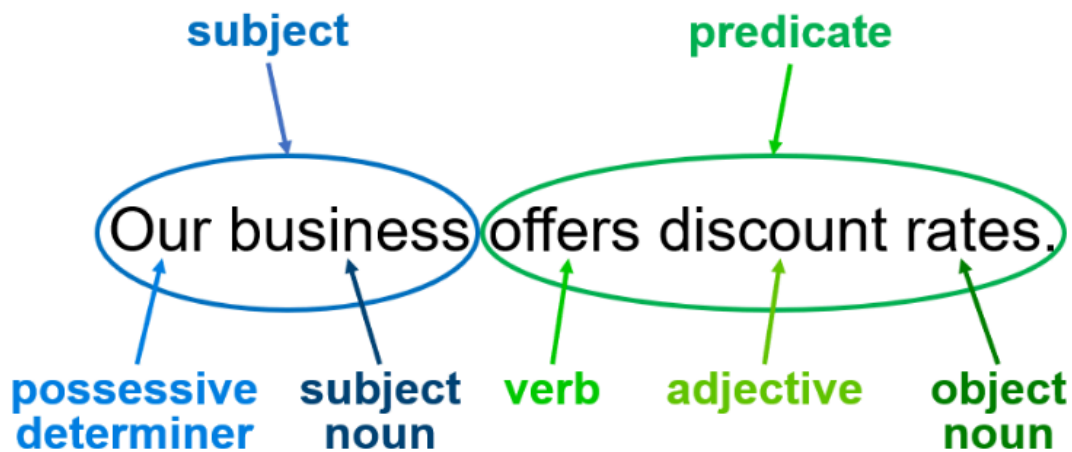
exactly to improve. It's likewise worth learning grammar terminology because writing mistakes undermine your professionalism, and you won't know how to write correctly, such as where to put punctuation and where not to, if you don't know basic sentence structure and the terminology we use to describe it. Trust me, we'll be using it often throughout this chapter and the next. Many native English speakers who say, "I don't know what the rule's called, but I know what looks right" actually *can* improve their writing if they understand more about how it works. Pay close attention throughout the following introductory lesson on sentence structure and variety especially if you're not entirely confident in your knowledge of grammar.

- 4.3.1: Four Sentence Moods
- 4.3.2: Four Sentence Varieties
- 4.3.3: Sentence Length
- 4.3.4: Active- *vs.* Passive-voice Sentences

4.3.1: Sentence Structure and the Four Moods

Four basic sentence moods (or types) help you express whatever you want in English, as detailed in Table 4.3.1 below. The most common sentence mood, the declarative (a.k.a. indicative), must always have a subject and a predicate to be grammatically correct. The **subject** in the grammatical sense (not to be confused with the topic in terms of the content) is the doer (actor or performer) of the action. The core of the subject is a noun (person, place, or thing) that does something, but this may be surrounded by other words (modifiers) such as adjectives (words that describe the noun), articles (*a, an, the*), possessive determiners (e.g., *our, my, your, their*), quantifiers (e.g., *few, several*), etc. to make a noun phrase. The core of the **predicate** is a verb (action), but it may also be preceded by modifiers such as adverbs, which describe the action in more detail, and followed by an **object**, which is the thing (noun or noun phrase) acted upon by the verb. If you consider the sentence *Our business offers discount rates*, you can divide it into a subject and predicate, then further divide those into their component parts of speech (nouns, verbs, adjectives, etc.):

Figure 4.3.1: Breakdown of a simple declarative sentence into its component parts of speech



Our business offers discount rates

- Subject = **Our business**
 - Possessive determiner = Our
 - Subject noun = business
- Predicate = **offers discount rates**
 - verb = offers
 - adjective = discount
 - object noun = rates

Subjects and predicates can also grow with the addition of other types of phrases (e.g., prepositional, infinitive, participial, gerund phrases) (Cimasko, 2013; Purdue OWL, 2010, 2011a, 2011b; Darling, 2014a) to clarify meaning even further. As large as a sentence can get with the addition of all these parts, however, you should always be able to spot the core noun of the subject and main verb of the predicate. Sentences that omit either are called fragments and should be avoided (or fixed later, as we'll see in §5.2) because they confuse the reader, being unclear about who's doing what.

Table 4.3.1: Four Sentence Moods

Sentence Mood	Structure and Use	Example and Breakdown
1. Declarative	<ul style="list-style-type: none"> Subject + predicate States information The most common type of sentence 	<p>We quickly updated our computer systems.</p> <p><i>Subject:</i> We (pronoun) <i>Predicate:</i> quickly updated our computer systems (verb phrase):</p> <ul style="list-style-type: none"> <i>Verb:</i> updated <i>Adverb:</i> quickly <i>Object:</i> our computer systems (noun phrase): <ul style="list-style-type: none"> <i>Noun:</i> systems <i>Determiner:</i> our (possessive) <i>Adjective:</i> computer
2. Imperative	<ul style="list-style-type: none"> Just a predicate (verb phrase) Gives an order or instruction (e.g., in a list of instructions), or makes a request 	<p>Please update our computer systems quickly.</p> <p><i>The subject (e.g., You) that would be identified in the declarative form is always assumed (never included).</i></p>
3. Interrogative	<ul style="list-style-type: none"> Verb phrase + subject + object, ending with a question mark Asks a question 	<p>Can you please update our computer systems quickly?</p>
4. Exclamatory	<ul style="list-style-type: none"> Same structure as a declarative, but ends with an exclamation point Expresses emotion 	<p>Thanks for updating our computer systems so quickly!</p>
5. Subjunctive	<ul style="list-style-type: none"> Uses <i>were</i> as the form of to be Expresses hypothetical scenarios 	<p>If you were to update our computer systems this weekend, we would be incredibly grateful.</p>

A declarative sentence with just a straightforward subject and predicate is a simple sentence expressing a complete thought. If all sentences were simple, such as you might see in a children's reader (e.g., *The dog's name is Spot. Spot fetched the stick. He is a good boy sometimes.* etc.), we would say that this is a choppy or wooden style of writing. We avoid this result by adding subject-predicate combinations together within a sentence to clarify the relationships between complete thoughts. Such combinations make what's called compound, complex,

and compound-complex sentences. Before we break down these sentence varieties, however, it's important to know what a clause is.

4.3.2: Four Sentence Varieties

We keep our readers interested in our writing by using a variety of sentence structures that combine simple units called **clauses**. These combinations of subjects and predicates come in two types:

1. An **independent** or **main clause** can stand on its own as a sentence like the simple declarative ones broken down in §4.3.1 above.
2. A **dependent** or **subordinate** clause begins with a subordinating conjunction like *when, if, though*, etc. (Darling, 2014b) and needs to either precede or follow a main clause to make sense. Like a domesticated dog that strays from their owner, a dependent clause can't survive on its own; if it tries anyway, a subordinate clause posing as a sentence on its own is just a fragment (see §5.2 below) that confuses the reader.

An independent clause on its own plus combinations of these two types of clauses make up the four varieties of sentences we use everyday in our writing. Two or more independent clauses joined together with a comma and coordinating conjunction (see Table 4.3.2a below for the seven of them, represented by the mnemonic acronym *fanboys*) or semicolon (;) make a **compound sentence** (Darling, 2014c, 2014d, 2014e). When combined with a main clause by a subordinating conjunction, a subordinate clause makes a **complex sentence** (Darling, 2014e). That subordinating conjunction (see a variety of them in Table 4.3.2a below) establishes the relationship between the subordinate and main clause as one of time, place, or cause and effect (Simmons, 2012). When a subordinate clause precedes the main clause, a comma separates it from the main clause (as in this sentence to this point), but a comma is unnecessary if the subordinate clause follows the main clause (as in this sentence from *but* onwards; notice that a comma doesn't come between *unnecessary* and *if*).

Table 4.3.2a: Coordinating and Subordinating Conjunctions

Coordinating Conjunctions	Subordinating Conjunctions
for	After
and	Although
nor	As
but	As if
or	As long as
yet	As though
so	Because
	Before
	Even if
	Even though
	If
	If only
	In order that
	Now that
	Once
	Provided that
	Rather than
	Since
	So that
	Than
	That
	Though
	Till
	Unless
	Until
	When
	Whenever
	Where
	Whereas
	Wherever
	Whether
	While

You can combine compound and complex sentences into compound-complex sentences, like the sentence that precedes this one, though you should keep these streamlined so your wordcount (29 words in the sentence just before Table 4.3.2a, not including the parenthetical asides) doesn't make comprehension difficult. We'll return to the question of length in the following subsection (§4.3.3), but let's focus now on how these four sentence varieties are structured.

Table 4.3.2b: Four Sentence Varieties

Sentence Variety	Structure & Use	Examples
1. Simple	<ul style="list-style-type: none"> • Subject + predicate (one independent clause) • Expresses one complete thought • Stylistically straightforward for easy comprehension 	<p>We quickly updated our computer systems.</p> <p><i>Subject:</i> We (noun) <i>Predicate:</i> quickly updated our computer systems (verb phrase):</p> <ul style="list-style-type: none"> • <i>Verb:</i> updated • <i>Adverb:</i> quickly • <i>Object:</i> our computer systems (noun phrase): <ul style="list-style-type: none"> ◦ <i>Noun:</i> systems ◦ <i>Determiner:</i> our (possessive) ◦ <i>Adjective:</i> computer
2. Compound	<ul style="list-style-type: none"> • At least two independent clauses joined by either (1) a comma and coordinating conjunction or (2) a semicolon (;) • Combines complete thoughts to show the relationship between them (e.g., the coordinating conjunction and connects the ideas, but contrasts them, so establishes cause and effect, or distinguishes them as possibilities, etc.) 	<p>Productivity increased 35% by the end of the week.</p> <p>We updated our computer systems on the 12th, and productivity increased 35% by the end of the week.</p> <p>We updated our computer systems on the 12th; productivity increased 35% by the end of the week.</p> <p>We updated our computer systems on the 12th, yet productivity didn't increase the next day.</p> <p>We updated our systems on the 12th, but gains in productivity weren't seen till the end of the week.</p> <p><i>If the subject is the same in both clauses, omit both the comma that precedes the conjunction, as well as the repeated the subject:</i></p> <p>We updated our computer systems and increased our productivity 35% by the end of the week.</p> <p><i>(The subject "we" is common to both clauses, so the second "we" [in "we increased"] is omitted, making this a single independent clause with coordinated verbs ["updated" and "increased"] rather than two coordinated clauses.)</i></p>
3. Complex	<ul style="list-style-type: none"> • Subordinate clause + main clause • Signalled by a subordinating conjunction (e.g., <i>when, if, though, after, because, since, until</i>, etc.) • The subordinating conjunctions show the relationships between clauses 	<p>After we updated our computer systems on the 12th, productivity increased 35% by the end of the week.</p> <p><i>When the subordinate clause precedes the main clause, a comma separates them, as in the example above. When the subordinate clause follows the main clause, a comma is unnecessary, as in the example below.</i></p> <p>Productivity increased by 35% in a week after we updated our computer systems on the 12th.</p> <p><i>However, if the subordinate clause strikes a contrast with the main clause preceding it, a comma separates them:</i></p> <p>Productivity increased by 35%, although it took a week after updating our systems to see those gains.</p>

4. Compound-complex	• Combines compound and complex sentences, requiring at least two independent clauses and one dependent clause	When we updated our computer systems on the 12th, productivity increased 35% by the end of the week, but the systems needed updating again within the month to restore productivity increases. (31 words)
	• Use occasionally because these can be long sentences	<i>Introductory dependent clause + independent clause + independent clause</i>

Combinations of sentence moods and varieties are all possible, so we have many hybrid sentence structures available to express our thoughts. For instance, an introductory subordinate clause can precede an interrogative main clause:

If you are available to update our computer systems on the 12th, can you please sign and return the attached contract at your earliest convenience?

Combining clauses to communicate your ideas is a skill like any other that requires practice, which you do whenever you draft a message. The more you do it, the better you get at it and the easier it becomes. It's essential to your professional success that you become good at it, however, because your reading audiences will become frustrated with you if you cannot put sentences together effectively. Worse, disorganized sentences betray a scattered mind. Rather than stop to help you, your readers are more likely to avoid you because they have no time for the lack of professionalism signalled by poor writing and the miscommunication it leads to. Before we return to the subject of clauses when we examine how to correct sentence errors (see §5.2 below), we should stop to consider the issue of sentence length brought up in our discussion of compound-complex sentences above.

4.3.3: Sentence Length

What is the appropriate length for a sentence? Ten words? Twenty? Thirty? The answer will always be: it depends on what you expect your audience to be able to handle and what you need to say to express a complete thought to them. A children's primer sticks to simple sentences of 5-7 concise words because children learning how to read will be stymied by anything but the simplest possible sentences. A 30-page market analysis report aimed at business executives with advanced literacy skills, on the other hand, will have sentences of varying lengths, perhaps anywhere from 5 to 45 words. The longer sentences with plenty of subordination and compounding will hopefully be rare because too many sentences of 45 words will exhaust a reader's patience and compromise comprehension with complexity. Too many five-word sentences will insult the reader's intelligence, but they play well as punchy follow-ups that conclude paragraphs full of long sentences. Ultimately, you should treat your audience to a variety of sentence lengths (Nichol, 2016).

Sentences in most business documents should average around 25 words, which you may consider your baseline goal for sentence length. There's nothing wrong with sentences shorter than that if they don't sacrifice

clarity in achieving conciseness. There's also nothing wrong with writing the odd 40-word sentence if it takes that many words to express a complete (and probably complex) thought when anything less would again sacrifice clarity. In all cases, however, you must consider your intended audience's reading abilities.

If the goal of communication is to plant an idea hatched in your brain undistorted into someone else's brain, don't make length a distorting factor. Sentences can technically go on forever with compounding and subordination, yet still be grammatically correct, because a long sentence is not the same as a run-on (Darling, 2014f). But too many 40-word sentences in a row will betray a lack of skill in concision and respect for audience attention spans. Ultimately, no hard and fast rules for sentence length keep us from writing sentences that are as short or long as they need to be, but there is such a thing as *too* much if length becomes a barrier to understanding.

4.3.4: Active- vs. Passive-voice Sentences

When your style goal is to write clear, concise sentences, most of them should be in the active voice rather than passive. **Voice** in this grammatical sense concerns the order of words around the main verb and whether the verb requires an additional auxiliary (helper) verb. We use two voice varieties:

- **Active-voice clauses** are easy and straightforward because they begin by identifying the subject (the doer of the action), then say what the subject does (the verb or action) without an auxiliary verb, and end by identifying the object (the thing acted upon) if the verb is transitive (takes an object). The simple sentence we saw in Table 4.3.2b above follows this easy subject-verb-object order.
- **Passive-voice clauses**, on the other hand, reverse this subject-verb-object order to place the object first, follow with a passive verb phrase (more on that below), and optionally end with the doer of the action in a prepositional phrase starting with *by*.

Consider the following example simple sentences that say the very same thing in both voices, one in the subject-verb-object active voice, the other in the object-verb-subject passive voice:

Figure 4.3.4: Comparison of active- and passive-voice sentences

We can further divide the passive voice into sentences that identify the doer of the action and those that don't:

Active voice: The manager chose Sara.

subject verb object

Passive voice: Sara was chosen by the manager.

object auxiliary verb past participle verb preposition subject

Active Voice: The manager chose Sara

- Subject = The manager
- Verb = chose
- Object = Sara

Passive Voice: Sara was chosen by the manager.

- Object = Sara
- Auxiliary verb = was
- Past participle verb = chosen
- Preposition = by
- Subject = the manager

We can further divide the passive voice into sentences that identify the doer of the action and those that don't:

Table 4.3.4: Comparison of Active- and Passive-voice Sentences

Voice	Examples	Structural Breakdown
Active Voice	The manager chose Sara.	<i>Subject (doer):</i> The manager <i>Verb:</i> chose (<i>past tense</i>) <i>Object:</i> Sara
Passive Voice	Sara was chosen by the manager.	<i>Object:</i> Sara <i>Verb phrase:</i> was chosen (<i>form of to be + past participle</i>) <i>Preposition:</i> by <i>Subject (doer):</i> the manager
Passive Voice	Sara was chosen.	<i>Object:</i> Sara <i>Verb phrase:</i> was chosen (<i>form of to be + past participle</i>) <i>Preposition:</i> by <i>Subject (doer):</i> the manager

From this you can see that the two necessary markers of a passive-voice construction are:

- **A form of the verb *to be*** as an **auxiliary (helper) verb** paired with the main verb, usually right before it. The auxiliary verb determines the tense of the main verb:
 - Past forms of *to be*: *was, were*
 - Sara **was** chosen. We **were** chosen.
 - Past perfect form of *to be*: *had been*
 - Sara **had been** chosen.
 - Present forms of *to be*: *am, are, is*
 - Sara **is** chosen. You **are** chosen. etc.
 - Future form of *to be*: *will be*
 - Sara **will be** chosen.
 - Future perfect form of *to be*: *will have been*
 - Sara **will have been** chosen by then.
- The **main verb** in its **past participle** form.
 - Some verbs, like *to choose*, will have an *n* added to the past-tense form to make the past participle (*chosen*).
 - Other verbs' past participle form is the same as their past-tense form, such as *to promote*, which forms *promoted* in both the simple past tense and past participle; e.g., the active-voice sentence *The manager promoted Sara* becomes the passive *Sara was promoted*.

Be careful, however: a sentence having a form of the verb *to be* in it doesn't necessarily make it passive; if the form of the verb *to be* is the main verb and it isn't accompanied by an auxiliary, such as in the sentence *Sara is thrilled*, then the form of the verb *to be* is what's called a copular verb, which functions as an equals sign ("Sara = thrilled"). And though the prepositional phrase "by [the doer of the action]" may also signal a passive voice, the fact that identifying the doer is optional means that having the word *by* in the sentence doesn't guarantee that it's in the passive voice. For instance, the active-voice sentence *Sara won the promotion by working hard all year* is in the active voice and uses *by* in a manner unrelated to voice type.

Readers prefer active-voice (AV) verbs in most cases because AV sentences are more clear and concise—clear because they identify who does what (the manager chose someone in the Figure 4.3.4 and Table 4.3.4 example AV sentences), and concise because they use as few words as possible to state their point. Passive-voice (PV) verbs, on the other hand, say the same thing with more words because, in flipping the order, they must add an auxiliary verb (*was* in the above case) to indicate the tense—as well as the preposition *by* to identify the doer of the action, totalling six words in the above example to say what the AV said in four. If the PV didn't add these words, then simply flipping the order of words to say "Sara chose the manager" would turn the meaning of the sentence on its head.

You can make the PV sentence shorter than even the AV one while still be grammatically correct, however, by omitting the doer of the action, as in the second PV example given in Table 4.3.4. The catch is that doing this makes the sentence less clear than the AV version. AV clauses cannot just omit the subject because they would be grammatically incorrect fragments: *Chose Sara*, for instance, would make no sense on its own as a sentence, whereas *Sara was chosen* would, even though it begs the question, "By whom?" PV sentences are thus either vague or wordy compared with AV, which are qualities exactly opposite our stylistic ideal of being clear and concise.

Now, before you fall into the trap of thinking that this is some kind of advanced writing technique just because it takes considerable explanation to break it all down, it's worth stopping to appreciate that you speak AV sentences all day every day, as well as naturally slip into the PV for strategic purposes probably about 5-10% of the time, even if you didn't have the terminology to describe what you were doing until now. You just do it to suit your purposes. Sometimes those purposes are contrary to the ideals of good writing, such as when people lapse into the passive voice—even if they don't realize it—because they think it makes their writing look more sophisticated and scientific sounding, or they just want to write complicated, wordcount-extending sentences to make up for an embarrassing lack of things to say. In such cases, discerning readers aren't fooled; they know what the writer is doing and are frustrated by having to hack and slash through vague and wordy verbiage to rescue what meagre point the author meant to make. Please (*please!*) don't use the PV in this way.

Appropriate uses of the PV, on the other hand, are few. You can use it to:

1. **Emphasize the object of the verb** (the person, place, or thing acted upon) for variety amidst a majority of AV sentences that prioritize the subject. In the Table 4.3.4 example, saying "Sara was chosen" in the PV focuses the audience's attention on the object, Sara, by putting her first, rather than on the manager

as the doer of the action. Indeed, the manager's role in the choosing might be so irrelevant that they can exit the sentence altogether, perhaps because the context of the conversation makes it so obvious that it goes without saying.

2. **Hide the doer of the action.** If Sara was chosen for a promotion over her colleagues, saying "Sara was chosen" in the PV focuses on her accomplishment while drawing attention entirely away from the manager. Perhaps you don't want the people who were passed up for promotion to know who exactly they should direct their resentment at. Using the PV in this case makes the choice of Sara sound objective, like anyone would have chosen her for this promotion because she really deserved it. PV is often used in this way as a public relations strategy to control the message. This use of the PV can be quite problematic when used as cover for the doer (see #3 below), however, as we see in the rhetoric surrounding gender violence. Rephrasing a sentence like *John beat Mary* as *Mary was beaten* shifts the focus of violence to the victim rather than the perpetrator by dropping the latter from the conversation altogether. We need to target the perpetrators of gender violence (mainly men and boys), however, as the root of the problem if we hope to reduce and eliminate the harm done to women and girls, as explained in the accompanying video lecture (TEDx Talks, 2013, 4:15-6:50).



A YouTube element has been excluded from this version of the text. You can view it online here:
<https://pressbooks.nsc.ca/llscomm/?p=78>

3. **Avoid accepting responsibility.** In answer to an irate parent's question "Who broke this glass?" a

fibbing two-year-old might say, “It was just broken when I got here.” We learn early—long before we even know how to read and write—how to cover up for our mistakes with this trick of language. Even dodging politicians will say, “Clearly, mistakes were made,” which makes it sound as if the blunders were made by unknown actors, rather than the policy-makers themselves, as the more honest alternative in the AV, “Clearly, we made mistakes,” would make clear (Benen, 2015).

4. Indicate that **you don’t actually know who the doer is**. Saying “A charitable donation was left in our mailbox” in the PV is stylistically appropriate if you want to focus on the donation and don’t know who left it, whereas “Someone left a charitable donation in our mailbox” is an AV equivalent that focuses more on the anonymity of the benefactor.
5. **State a general rule or principle** without singling anyone out. Declaring that “Returns must be accompanied with a receipt in order to receive a refund” in the PV is a more tactful, less authoritarian and negative way of saying “You can’t get a refund without a receipt” in the AV.
6. Follow a stylistic preference for PV sentences in some **scientific writing**. Saying “The titration was performed” or “a lean approach is recommended” sounds more objective—albeit a little unnatural, especially when nearly every sentence is in the PV rather than the 5-10% we are used to in conversation—compared with the more subjective-sounding AV statements “I performed the titration” or “I recommend a lean approach.” (See the following paragraph for a solution to this predicament.)

We’re focusing on AV and PV now at the drafting stage of the writing process because favouring the AV is a stylistic requirement in business and technical writing where clarity and conciseness are especially valued, but it’s also possible to sound objective in the AV in technical writing. You can, for instance, identify the role of the doer rather than an individual person by name or first-person pronoun. Sentences like “The lab technician performed the titration” or “This report recommends a lean approach” still sound objective in the AV and therefore have an advantage over the PV.

We will return to the issue of AV *vs.* PV in §5.4 on editing for style, but if you train yourself to write in the AV rather than PV as a habit and only use PV when it’s justified by strategic advantage or necessity, you can save yourself time in both the drafting and editing stages of the writing process. For further explanation of the AV *vs.* PV and example sentences, see:

- Passive and Active Voices (Darling, 2014g)
- Active and Passive Voice (Toadvine, Brizee, & Angell, 2011)
- Passive Voice: When to Use It and When to Avoid It (Corson & Smollett, 2007)

Key Takeaways



Flesh out your draft by expanding outlined points into full, mostly active-voice sentences that are varied in length and style as simple, compound, complex, and compound-complex structures correct in their declarative, imperative, interrogative, exclamatory, or subjunctive mood.

Exercises



1. Re-read the paragraphs above in this chapter section and pull out examples of declarative and imperative sentences, as well as simple, compound, and complex sentences (but not those given as examples when illustrating each form, in or out of the tables). In your document, write headings in bold for each sentence type and variety, then copy and paste at least a few examples under each.
2. Take the outline you drafted for the email if you did Exercise 2 at the end of §4.2 (or any other outlined message that you intend to write) and expand those points into a message that includes at least one example of each of the four sentence types and varieties covered in this section.
3. Identify whether the sentences in the following Guide to Grammar & Writing digital activity are in the active or passive voice: <http://www.dactivity.com/activity/index.aspx?content=3BIFrLublu>
4. Copy and paste at least five active- and five passive-voice main clauses from sentences in the paragraphs of this chapter section (besides those used as examples) into a document and break them down to identify their subject, main verb (or passive verb phrase, including the auxiliary verb) and object in the manner demonstrated in Table 4.3.4. Under each, rewrite the five active-voice clauses as passive-voice sentences, and each of the passive-voice clauses as active-voice sentences.

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4.4: FORMING EFFECTIVE PARAGRAPHS

Learning Objectives



3. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences

As you expand your research material and outline notes into sentences, you will also begin to package those sentences into larger units—paragraphs—that follow a standard, familiar structure that enables readers to easily follow their content and locate key information at a glance. If a sentence communicates a complete thought, a paragraph communicates a topic comprised of a few thoughts coherently collected together in an organized sequence. (Paragraphs themselves assemble to form larger units of meaning such as sections in a report, as we shall see in §7.3–4 below, or chapters in a book as you can see in this one, so paragraphs represent an intermediate level of organization in larger documents.) Whether your message is a long one made of many paragraphs or just one paragraph fired off in an email, organizing paragraphs helps you clarify your thoughts to both yourself and your reader.

- 4.4.1: Paragraph Size and Structure
- 4.4.2: Paragraph Coherence

4.4.1: Paragraph Size and Structure

A well-organized paragraph follows the standard three-part message structure outlined in §4.1 above. In a paragraph, we call these three parts the:

1. Topic sentence
2. Body or development sentences

3. Transitional or concluding sentence

At minimum, then, a paragraph should have at least three sentences, but ideally 4-5 to allow the development sentences in the body to explore the topic in detail. If a rule of thumb on sentence length is that sentences should vary in size but average about 25 words long (see §4.3.3 above), then a normal paragraph should be about ten lines on the page when the font is 12-pt. in a document with 1-inch margins. Like sentences, however, paragraphs should vary in length depending on audience needs and abilities, as well as the topics being covered. An audience with advanced literacy skills can handle longer paragraphs that would lose an audience reading at a more basic level, which takes us back to our earlier points about adjusting the message to the audience profile (see §2.2 above). Some topics need more development sentences than others and don't easily divide in the middle, though a paragraph of ten sentences or more is really pushing it. "Wall-of-text" paragraphs longer than a page are out of the question in professional writing. No matter what the size, however, all paragraphs should follow the standard structure explained below so that readers at any level can easily find what they're looking for.

1. Topic Sentence

The topic sentence states the main point or thesis of the paragraph and thus summarizes the small collection of sentences following it, so the reader can take in the whole before examining the parts. As we saw in §4.1 above, this direct-approach organization caters to the primacy effect in our psychology whereby first impressions are the strongest and most memorable. Readers should thus be able to see how every sentence in any well-organized paragraph expands on something said in the topic sentence. In this particular paragraph, for example, you will see how the second sentence expands on the part in the topic sentence about accommodating the reader. The third sentence extends that idea to expand on the part in the topic sentence about how topic sentences summarize all paragraph parts as a whole. The sentences that follow (including this one) illustrate how that system works with examples. The final sentence wraps up the topic as broached in the first sentence while bridging to the next topic sentence, which in this case is about how to come up with a topic sentence.

For many writers, drafting a topic sentence is typically a search for one while writing the rest of the paragraph first and then discovering it as a concluding summary exercise. When you are just putting ideas down in the drafting stage of the writing process, you may not know yet what your point is at the outset of writing a paragraph. You likely have a general sense of your topic and some points to cover, probably based on information you collected in your research earlier (see Ch. 3 on Stage 2 of the writing process). As you connect that evidence and build sentences around those information points, you begin to see where you're going with the topic and the thesis suddenly comes into focus near the end. If you then say "In conclusion, ..., " summarize what you were getting at in a nutshell, and leave it there, however, you will do your reader a disservice by leaving your topic sentence buried under the pile of evidence that should be supporting it. In this case, delete "In

conclusion,” highlight the final sentence, copy and cut it (ctrl. + c, ctrl. + x), and paste it (ctrl. + v) at the top of the paragraph so it does what a topic paragraph should do: preview what follows with an at-a-glance summary.

2. Body or Development Sentences

The development sentences expand on every component part of the topic sentence in a sequence of complete thoughts. The sentences that comprise this sequence explore the topic by following an organizing principle through detailed explanations, supporting evidence, illustrative examples, rhetorical counterpoints, and so on. The organizing principle could be any of those listed in Table 4.1.3 above such as chronology or comparison and contrast. As parts of a logical sequence of sentences, each sentence connects to those around it with pronouns that use effective repetition (referring to nearby points without repeating them word for word; see Table 4.4.2a below) and transitional expressions (see Table 4.4.2b) to drive the topic exploration forward. In the paragraph under “1. Topic Sentence” above, for instance, the pronoun “this” in the first development sentence (the second sentence in the paragraph) represents the topic sentence position referred to in the topic sentence preceding it. In the sentence above this one, the transitional phrase “for instance” signals an illustrative example offered as supporting evidence of the topic sentence thesis on the sentences’ path towards the transitional or concluding sentence.

3. Transitional or Concluding Sentence

The final sentence of a well-organized sentence wraps up the topic exploration by completing the main point stated in the topic sentence, as well as establishing a thematic bridge to the topic sentence of the next paragraph if indeed there is one. As a bridge, the final sentence looks forward to the following topic sentence by previewing some of its terminology, just as the paragraph preceding this one does. As a wrap-up, the final sentence should in no way merely paraphrase the topic sentence, as you were probably taught to do in middle school or junior high, because the repetition of a point read 20 seconds earlier would waste the reader’s time. Any topic summary belongs at the top where it can summarily preview the paragraph’s subject, not buried at the bottom. Rather, the final sentence concludes the topic in the sense that it completes the expansion of topic-sentence points carried by the development sentences, leaving no loose ends to confuse the reader.

Especially in cases of stand-alone paragraphs or final paragraphs in a document, concluding sentences that tie up those loose ends with a clever and memorable turn of phrase cater to the recency principle in psychology. Recall how “recency” means that final impressions have impact similar to first impressions (see §4.1 above), making the concluding/transitional sentence an important one to the overall success of a paragraph in ensuring that the main point broached in the topic sentence is fully understood. With every part of a paragraph fulfilling a purpose towards communicating a larger point, the double duty that the concluding/transitional sentence performs makes it the glue that binds together paragraphs and the documents they comprise.

4.4.2: Paragraph Coherence

Coherence is achieved by paragraphs sticking to the topic summarized in the opening sentence, as well as using pronouns and transitional expressions to link sentences together while developing that topic. Paragraphs that grow to the point where they exceed about a dozen lines on the page usually deserve to be broken up into a couple of topics as their internal transitions take them into territory far enough from the topic stated in the first sentence. Generally, a paragraph sticks to just one topic while the one following it covers a related but distinct topic.

Like the organizational principles we explored above, we have a repertoire of recognizable pronouns, transitional expressions, and particular words or phrases that connect ideas in our writing so readers can easily follow our trains of thought. **Pronouns** such as those in Table 4.4.2a below allow us to represent nouns, phrases, and even whole sentences that came before (called antecedents) without repeating them word for word—as long as the antecedents are clear (Pronouns, 2016; Darling, 2014; see also §5.2 on proof-editing for pronoun-antecedent disagreement or ambiguity).

Table 4.4.2a: Pronoun Types and Examples

Pronoun Type	Singular	Plural	Examples in Sentences
1. Personal subject pronouns	<i>1st person: I</i> <i>2nd person: you</i> <i>3rd person: she, he, it</i>	we you they	I wrote the script so that we would be prepared. Would you all prefer if you , Jenny, went first? She said that he could do it first instead. The team members are really quite good at what they do.
2. Personal object pronouns	<i>1st person: me</i> <i>2nd person: you</i> <i>3rd person: her, him, it</i>	us you them	The committee awarded the contract to me but the credit goes to all of us . They could give one to you , as well. The committee sent her the news yesterday, sent it to him today, and wished them all good luck.
3. Personal possessive determiners	<i>1st person: my</i> <i>2nd person: your</i> <i>3rd person: her, his, its</i>	our your their	My advice is to deposit your payment in our account now. Indeed, all your payments are late. Her payment came through, but his didn't. Their payment plan needs updating so that its bad timing doesn't get them in trouble.
4. Personal possessive pronouns	<i>1st person: mine</i> <i>2nd person: yours</i> <i>3rd person: hers, his, its</i>	ours yours theirs	Let's figure out what's mine and what's ours . You'll get yours . The house is hers , the car is his , but the account is theirs .
5. Reflexive and intensive pronouns	<i>1st person: myself</i> <i>2nd person: yourself</i> <i>3rd person: herself, himself, itself</i> <i>Reflexive: when the subject(s) and object(s) are the same person or people. Intensive: when it can be deleted without being ungrammatical.</i>	ourselves yourselves themselves	I gave myself a break and you gave yourself an ache when we threw ourselves in the lake. He perjured himself (<i>reflexive</i>) and she won herself a new car (<i>intensive</i>). Love itself was lost (<i>intensive</i>). Do yourselves a favour. They stopped themselves from falling.
6. Demonstrative pronouns	<i>close by: this</i> <i>remote: that</i>	these those	This deal might take some time. Pass me that report over there. These are the kinds of things you can expect when those people get involved.
7. Relative pronouns	<i>subject: who</i> <i>object: whom</i> <i>restrictive: that</i> <i>non-restrictive: which</i>		The accountant who does our taxes asked whom he should send the funds to. The account that he set up is a trust fund, which can be accessed in five years.
8. Interrogative pronouns	<i>personal: who</i> <i>objective: what, which</i> <i>possessive: whose</i>		Who is going to call? What are they going to say? Which company do they represent? Whose number are they going to use?

9. Indefinite pronouns	one, everyone, no one, none, someone, somebody, anybody, everybody, nobody, other, another, everything, either	all, most, many, several, some, few, others, both, neither	One of us cannot be wrong. Everybody knows somebody . No one can tell anyone else what to do. Everyone has a right to know everything , but many don't know that. All or most came today. Anybody can play guitar. Some went on, but none came back. Neither showed up, but either could have called, so both are at fault. Someone sent several calls to the others . Few can say that the other sent another .
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While pronouns often look back, **transitional expressions** drive a topic forward by establishing the relationships between the content of sentences. Table 4.4.2b below collects many such adverbs and conjunctive adverbs, prepositions and prepositional phrases, coordinating and subordinating conjunctions, infinitive phrases, interjections, and so on.

Table 4.4.2b: Transitional Expressions within and between Paragraphs

Transition Type	Examples		
1. Sequence	First, Second, Third, ... Initially, ... From the start,	...Next,, then ... Later,	...Ultimately, ... Finally, ...
2. Addition, repetition	Additionally, ... Again, ... Also ... Not only ..., but also ... Furthermore, and or, as well as ... Besides, ... Equally important ...	Further ... Alternatively, ... In addition, ... Another ... Moreover, ...
3. Time	When ... / Whenever ... Before ... Earlier, ... Recently, ... Meanwhile, ...	While ... Now ... Currently, ... During ... Immediately ...	Simultaneously, Subsequently, After ... Afterwards, ... At last, ...
4. Place, position	Above ... Below ... Near ... To the left/right of ...	Opposite ... Close to ... Adjacent to ... Farther on ...	Beyond ... In front of ... Behind ... Throughout ...
5. Logic, cause & effect	Therefore, ... Thus, ... For this reason, ... Consequently, ...	Hence ... If ..., then ... Clearly then, ... It follows that ...	Accordingly, ... As a result, ... Because ... Since ...
6. Similarity, comparison	In the same way, ... Just as ..., so too ...	Likewise, ... Similarly, also ...
7. Example	For example, ... For instance,, specifically in particular ...	To illustrate, ... In this way, ...
8. Opposition, exception, contrast	However,, however, notwithstanding, ... On the one/other hand, ... On the contrary,, but, although ... Nevertheless, ... Nonetheless, instead ...	Still,, yet ... In spite of ... In contrast, ...
9. Emphasis	Indeed, ... In fact, ...	Even ... Of course, ...	
10. Paraphrase, summary	In other words,—that is,—that is to say, ... To paraphrase, ...	To summarize, ... In conclusion, ... In sum, ... in a nutshell, ...	In a word, ... In brief, ... Ultimately, ... in the end, ...

Source: Transitional Expressions (2003)

Key Takeaway



Collect and connect your sentences into coherent paragraphs that use a three-part structure to provide readers with a means to skim when pressed for time, find appropriate detail otherwise, and follow your train of thought through the effective use of pronouns and transitions.

Exercises



1. Find a professionally written document that contains paragraphs. Copy and paste one paragraph (or transcribe it if it's from a print source) into a document and separate the sentences so that you put the topic sentence under the heading "Topic Sentence," development sentences under a heading of their own, and concluding/transitional sentence under a heading of its own, too. Under each development sentence, explain what part of the topic sentence it expands on. If the paragraph lacks coherence, rewrite (1) the topic sentence so it's a more effective summary of the whole paragraph, and (2) each development sentence so its role in extending the topic sentence is clearer.
2. Write a coherent, well-organized paragraph on a topic you recently learned about in another course in your program. Don't use the textbook or other text that you learned it from as a source to copy from; instead, write from memory and your understanding. Ensure that:
 - i. The topic sentence explains the whole thing in a nutshell
 - ii. Each of the development sentences expand on ideas in the topic sentence and flow from one to another using pronouns from Table 4.4.2a and transitions from Table 4.4.2b.
 - iii. The concluding sentence completes the reader's understanding of the topic.
3. Write a paragraph on how to make coffee, tea, or another hot beverage. Begin the paragraph with a topic sentence, provide the details in the development sentences, and end with a concluding sentence. Include at least two transitional expressions from the table above.

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4.5: STANDARD BUSINESS STYLE

Learning Objectives



3. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Among the most important skills in communication is to adjust your style according to the audience to meet their needs as well as your own. You would speak differently to a customer or manager compared with how you would to a long-time co-worker who has also become a friend. In each case, these audiences have certain expectations about your style of communication, and you must meet those expectations to be respected and maintain good relations. This section reviews those style choices and focuses especially on the six major characteristics of good writing common to both formal and casual writing.

- 4.5.1: The Formality Spectrum
- 4.5.2: The 6 Cs of Style

4.5.1: The Formality Spectrum

We began looking at the general choice between a formal and informal style of writing based on how you've profiled your audience's position in relation to you in §2.2.3 above. There, we saw how certain situations call for formal writing and others for a more relaxed style, and saw in Table 2.2.3 that these styles involve word choices along a spectrum of synonyms from "slangy" to casual to fancy. Here we will review those considerations in the context of the writing process.

1. Formal Style in Writing

Because a formal style of writing shows respect for the reader, use standard business English especially your goal is to curry favour with your audience, such as anyone outside your organization, higher than you within your organization, and those on or around your level whom you have never communicated with before. These audiences include managers, customers, clients, B2B suppliers and vendors, regulators, and other interested stakeholders such as government agencies. A cover letter, for instance, will be read by a future potential manager probably unfamiliar to you, so it is a very real test of your ability to write formally—a test that is crucial to your career success. Many common professional document types also require formality such as other letters, memos, reports, proposals, agreements, and contracts. In such cases, you are expected to follow grammatical rules more strictly and make slightly elevated word choices, but not so elevated that you force your reader to look up rarely used words (they will not; they will just make up their mind about you being pretentious and a slight pain to deal with).

Writing in such a style requires effort because your grammar must be tighter and the vocabulary advanced. Sometimes a more elevated word choice—one with more syllables than perhaps the word that comes to mind—will elude you, requiring you to use a thesaurus (such as that built into MS Word in the Proofing section under the Review menu tab, or the Synonyms option in the drop-down menu that appears when you highlight and right-click a word). At the drafting stage you should, in the interests of speed-writing to get your ideas down nearly as fast as they come, go with the word that comes to mind and leave the synonym-finding efforts for the editing stage. Strictly maintaining a formal style in all situations would also be your downfall, however, because flexibility is also expected depending on the situation.

2. Casual Style in Writing

Your ability to gear-down to a more casual style is necessary in any situation where you're communicating with familiar people generally on your level and when a personable, conversational tone is appreciated, such as when writing to someone with basic reading skills (e.g., an EAL learner, as we saw in §2.2.3). In a routine email to a colleague, for instance, you would use the informal vocabulary exemplified in the semi-formal/common column of Table 2.2.3 above, including conversational expressions such as “a lot” instead of the more formal “plenty.” You would also use contractions such as *it's* for *it is* or *it has*, *would've* for *would have*, and *you're* for *you are* (see Table 5.3.2 for more contractions). Two paragraphs up from this one, the effort to model a more formal style included avoiding contractions such as *you've* in the first sentence, *it's* in the third, and *won't* and *they'll* in the last, which requires a determined effort because you must fully spell out each word. While not a sign of disrespect, the more relaxed approach says to the reader “Hey, we're all friends here, so let's not try so hard to impress each other.” When an upper-level manager wants to be liked rather than feared, they'll permit a more casual style of communication in their employees' interactions with them, assuming that doing so achieves collegiality rather than disrespect.

Incidentally, this textbook mostly sticks to a more casual style because it's easy to follow for a readership that includes international EAL learners. Instead of using the slightly fancy, three-syllable word “comprehend” in the middle of the previous sentence, for instance, “follow” gets the point across with a familiar, two-syllable word. Likewise, “casual” is used to describe this type of writing because it's a six-letter, three-syllable word that's more accessible to a general audience than the ten-letter, four-syllable synonym “colloquial.” These word choices make for small savings in character- and word-counts in each individual case, but, tallied up over the course of the whole book, make a big difference in size, tone, and general readability, while remaining appropriate in many business contexts. Drafting in such a style is easy because it generally follows the diction and rhythms that come naturally in common conversation.

3. Slang Style in Writing

As the furthest extreme on the formality spectrum, slang and other informal means of communication such as emojis are generally unacceptable in business contexts for a variety of reasons. First, because slang is common in teen texting and social media, it appears immature, frivolous, out of place, confusing, and possibly even offensive in serious adult professional situations. Say someone emailed a car cleaning company with questions about their detailing service and received a reply that looks like it was texted out by a 14-year-old trying to sound “street,” such as:

Fo sho i set u up real good, well get yr car cleen smooove top 2 bottom – inside + out – be real lit when were done widdit, cost a buck fiddy for da hole d-lux package, so u down widdit erwat

The inquiring customer would have serious concerns about the quality and educational level of the personnel staffing the company, and thus about the quality of work they'd do. The customer may even wonder if they'll get their car back after giving them the keys. The customer will probably just give the company a pass and continue looking for one with a more formal or even casual style that suggests greater attention to detail and awareness of professional communication standards. A company rep that comes back with a response more like the following would likely assure the customer that their car is in good hands:

Absolutely, we can do that for you. Our White Glove service thoroughly vacuums and wet-vacs all upholstery, plus scrubs all hard surfaces with pro-grade cleaners, then does a thorough wash and wax outside. Your autobody will be like a mirror when you pick it up. Please let us know if you are interested in our \$150 White Glove service.

Second, the whole point of slang is to be incomprehensible to most people, which is opposite the goal of communication discussed in §1.3 above, and especially in situations where you want to be understood by a general audience (see §2.2.3). As a deviation from accepted standards of “proper” vocabulary, grammar, punctuation, syntax, etc., slang is entirely appropriate in adolescent and subculture communication because it is meant to score points with an in-group that sets itself apart from the rest of polite society. Its set of codewords and nonstandard grammar is meant to confuse anyone not part of that in-group and would sound ridiculous if anyone else even tried to speak it, as when parents try to level with their teens in teen vernacular.

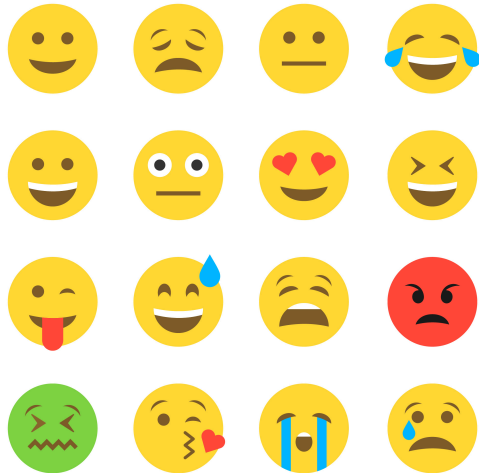
Obviously, if slang is used in professional contexts where audiences just don't know how to accurately translate the expressions, or they don't even know about Urban Dictionary to help translate "a buck fiddy" in the above example as \$150 rather than \$1.50, the ensuing confusion results in all the expensive problems brought on by miscommunication.

In terms of the writing process, professionals should generally avoid slang style in almost all business situations, even if it's what comes naturally, because it leaves the writer too much work in the editing stage. If slang *is* your style, it's in your best interests to bring your writing habits up to the casual level with constant practice. Perhaps the only acceptable situation where a slang-heavy style would be appropriate is if you're on a secure texting or IM channel with a trusted colleague whom you've developed a correspondence rapport with, in which case that style is appropriate for the audience because they understand it, expect it, and appreciate it. It can even be funny and lighten up someone's day.

The danger of expressing yourself in such a colourful style in email exchanges with that trusted friend-colleague when using company channels, however, is that they may be seen by unintended audiences. Say you have a back-and-forth exchange about a report you're collaborating on and you need to CC your manager at some point so that they are up to speed on your project (or someone else involved does this for you, leaving you no opportunity to clean up the thread of past emails). If your manager looks back at the atrocious language and sees offensive statements, your employment could be in jeopardy. You could just as easily imagine other situations where slang style might be advantageous, such as marketing to teens, but generally it's avoidable because it tends to deviate from the typical characteristics of good writing.

4. Emojis in Professional Writing?

Though emojis' typical appearance in social media and texting places them at the informal end of the formality spectrum, their advantages in certain situations require special consideration along with some clarity about their current place in professional communication. Besides being easy to access on mobile device keyboards and favoured in social media communication especially among millennials, emojis are useful for helping clarify the emotional state of the message sender in a way that plain text can't. They offer a visual cue in lieu of in-person nonverbals. A simple "thumbs up" emoji even works well as an "Okay, got it" reply in lieu of any words at all, so they can help save time for the busy professional. Interestingly, 2,500 years after Egyptian hieroglyphics fell out of use, pictographs are making a comeback! Emojis also go partway toward providing something of a universal language that allows people who speak different languages to communicate in a way that wouldn't have been possible otherwise.



However, the lack of precision in emojis can also cause confusion as they may be interpreted differently if the social and cultural context of the receiver differs enough from that of the sender (Pringle, 2018), not to mention differences in their emotional states. This means that emojis aren't as universal as some claim they are, especially when used by correspondents who speak different languages (Caramela, 2018). Even between those who speak the same language, a smiley-face emoji added to a lightly insulting text message might be intended as a light-hearted jab at the receiver by the sender, but might be read as a deeply cutting passive-aggressive dig by the receiver. The same text message said in person, however, comes with a multitude of nonverbal cues (facial expressions, eye movements, body movements, timing, voice intonation, volume, speed, etc.) that help the listener determine the exact intentions of the speaker—meanings that can't possibly be covered by a little 2D cartoon character.

You can imagine plenty of other scenarios where emojis could backfire with dire consequences. A red heart emoji added to a business message sent by a male to a female colleague, though perhaps meant in the casual sense of the word “love” when we say, “I love what you did there,” might be taken as signalling unwanted romantic intentions. In the #metoo era, this is totally inappropriate and can potentially ruin professional partnerships and even careers. Be careful with emojis also in any situation involving buying or selling, since commercial messages can end up in court if meanings, intentions, and actions part ways. In one case, emojis were used in a text message signalling intent to rent an apartment by someone who reneged and was judged to be nonetheless on the hook for the \$3,000 commitment (Pringle, 2017). As with any new means of communication, some caution and good judgment, as well as attention to notable uses and abuses that show up in the news or company policy directives, can help you avoid making potentially disastrous mistakes.

Though emojis may be meaningfully and understandably added to text/instant messages or even emails between familiar colleagues who have developed a light-hearted rapport featuring their use, there are several situations where they should be avoided at all cost because of their juvenile or frivolous social media reputation. It's a good idea to avoid using emojis in business contexts when communicating with:

- **Customers** or clients
- **Managers** who don't use emojis themselves
- **Colleagues** you don't know very well
- **Anyone outside** your organization
- **College instructors**
- **Older** people who tend to avoid the latest technology

However, in any of the above cases, you would probably be safe to mirror the use of emojis (see §10.6 below for more on mirroring) after your correspondent gives you the greenlight by using them first (Caramela, 2018). Yes, emojis lighten the mood and help with bonding among workplace colleagues. If used excessively as part of a larger breakdown of decorum, as mocked in the accompanying Baroness von Sketch Show video short (CBC Comedy, 2017), they suggest a troubling lack of professionalism. Managers especially should refrain from emoji use to set an example of impeccable decorum in communications to the employees they supervise.

[https://www.youtube.com/watch?v=XWA_j4Vy4oM\[/embed\]](https://www.youtube.com/watch?v=XWA_j4Vy4oM[/embed])

Source: CBC Comedy (2017)

4.5.2: The 6 Cs of Style

Whether you're writing in a formal or casual style, all good writing is characterized by the "6 Cs":

- Clear
- Concise
- Coherent
- Correct
- Courteous
- Convincing

Six-C writing is good for business because it fulfills the author's purpose and meets the needs of the audience by making communication understandable and impactful. Such audience-oriented writing is clearly understood by busy readers on the first pass; it doesn't confuse them with ambiguities and require them to come back with questions for clarification. It gets the point across in as few words as possible so that it doesn't waste readers' time with wordcount-extending filler. Good writing flows logically by being organized according to recognizable patterns with its sub-points connected by well-marked transitions. Six-C writing avoids confusing readers with grammar, punctuation, or spelling errors, as well as avoids embarrassing its author and the company they represent, because it is flawlessly correct. It leaves the reader with a good feeling because it is polite, positive, and focuses on the reader's needs. Six-C writing is persuasive because, with all the above

going for it, it exudes confidence. The following sections explain these characteristics in greater detail with an emphasis on how to achieve Six-C writing at the drafting stage.

1. Clarity

Clarity in writing means that the words on the page are like a perfectly transparent window to the author's meaning; they don't confuse that meaning like the dirty, shattered window of bad writing or require fanciful interpretation like the stained-glass window of poetry. Business or technical writing has no time for anything that requires the reader to interpret the author's meaning or ask for clarification. To the busy reader scanning quickly, bad writing opens the door for wrong guesses that, acted upon, result in mistakes that must be corrected later; the later the miscommunication is discovered and the further the mistakes spread, the greater the damage control required. Vague writing draws out the communication exchange unnecessarily with back-and-forth requests for clarification and details that should have been clear the first time. Either way, a lack of clarity in writing costs businesses by hindering personal and organizational productivity. Every operation stands to gain if its personnel's writing is clear in the first place.

So much confusion from vague expressions can be avoided if you use hard facts, precise values, and concrete, visualizable images. For example:

- Instead of saying “a change in the budget,” “a 10% budget cut” makes clear to the reader that they'll have to make do with nine of what they had ten of before.
- Instead of saying that a home's annual average basement radon level is a cause for concern, be specific in saying that it is 220 Bq/m³ (for becquerels per cubic metre) so that the reader knows how far above Health Canada's guideline level the home is and therefore the extent of remedial action required.
- Instead of saying that you're rescheduling it to Thursday, be clear on what's being rescheduled, what the old and new calendar dates and times are, and if the location is changing, too. If you say that it's the 3pm Friday meeting on May 25th being moved to 9am Thursday, May 31st, in room B349, participants know exactly which meeting to move where in their email program's calendar feature.
- Always spell out months so that you don't confuse your reader with dates in the “dd/mm/yy” or “mm/dd/yy” style; for instance, “4/5/18,” could be read as either April 5th or May 4th, 2018, depending on whether the author personally prefers one date form over the other or follows a company style in lieu of any universally accepted date style.
- Instead of saying at the end of an email, “Let's meet to discuss” and leaving the ball in your correspondent's court to figure out a time and place, prevent the inevitable time-consuming back-and-forth by giving your available meeting time options (e.g., “9-10am Thursday, May 31st; 2-3pm Friday, June 1st; etc.) in a bulleted list and suggesting a familiar place so that all your correspondent needs to do is reply once with their preferred meeting time from among those menu options and confirmation on the location.

- Instead of saying “You’ve got a message,” being clear that Tia Sherman from the Canada Revenue Agency left a voicemail message at 12:48pm on Thursday, February 8th, gives you the precise detail that you need to act on that information.

The same is true of vague pronouns such as *its, this, that, these, they, their, there*, etc. (see the demonstrative and indefinite pronouns, #6 and #9 in Table 4.4.2a above) when it’s unclear what they’re referring to earlier in a sentence or paragraph. Such pronoun-antecedent ambiguity, as it’s called (with *antecedent* meaning the noun that the pronoun represents), can be avoided if you can spot the ambiguity that the reader would be confused by and use other words to connect them to their antecedents. If you say, for instance,

The union reps criticized the employer council for putting their latest offer to a membership vote.

Whether the offer is coming from the union, the employer, or possibly (but unlikely) both is unclear because *their* could go either way. You can resolve the ambiguity by using words like *the former, the latter*, or a shortened version of one of the names:

The union reps criticized the employer council for putting the council’s latest offer to a membership vote.

When pronouns aren’t preceded by the noun to which they refer, the good writer must simply define them. Though these additions extend the wordcount a little, the gains in clarity justify the expense.

2. Conciseness

Because the goal of professional writing, especially when sharing expertise, is to make complex concepts sound simple without necessarily dumbing them down, such writing should communicate ideas in as few words as possible without compromising clarity. The worst writing predictably does the opposite, making simple things sound complicated. This is a rookie mistake among some students new to college or employees new to their profession. Perhaps because they think they must sound “smart,” they use expressions that are their attempt at imitating the kind of writing that goes over their head with fancy words and complex, wordcount-extending sentence constructions, including the passive voice (see §4.3.4 above). Such attempts are usually smokescreens for a lack of quality ideas; if someone is embarrassed by how meagre their ideas are, they tend to dress them up to seem more substantial. Of course, their college instructors or professional audiences are frustrated by this kind of writing rather than fooled by it because it doesn’t help them find the clear meaning that they expect and seek. It just gets in the way and wastes their time until they resent the person who wrote it.

If the temptation to overcomplicate a point is uncontrollable at the drafting stage, it’s probably better to vomit it all up at this point just so that you can get everything out while knowing that you’ll be mopping it up by paring down your writing later (see §5.1 below). By analogy, a film production will overshoot with perhaps 20 takes of (attempts at) a single shot just so that it has plenty of material “in the can” to choose from when assembling the sequence of shots needed to comprise a scene during post-production editing. However, as you become a better writer and hone your craft, you’ll be able to resist those filler words and overcomplicated expressions at the drafting stage from having been so aggressive in chopping them out at the editing stage of the

writing process so many times before. Of course, if you make a habit of writing concisely even at the drafting stage, you'll minimize the amount of chopping work you leave yourself at the editing stage.

3. Coherence and Completeness

Coherence means that your writing flows logically and makes sense because it says everything it needs to say to meet your audience's needs. The organizational patterns discussed in §4.1, outlining structures in §4.2, and paragraph organization in §4.4 all help to achieve a sense of coherence. The pronouns and transitions listed in Table 4.4.2a and Table 4.4.2b above especially help to connect the distinct points that make up your bare-bones outline structure as you flesh them out into meaningful sentences and paragraphs just as ligaments and tendons connect bones and tissues throughout your body.

4. Correctness

Correct spelling, grammar, mechanics, etc. should *not* be a concern at the drafting stage of the writing process, though they certainly must be at the end of the editing stage (see Ch. 5 below). As explained above in the §4.3 introduction above, speed-writing to get ideas down requires being comfortable with the writing errors that inevitably pockmark your draft sentences. The perfectionists among us will find ignoring those errors difficult, but resisting the temptation to bog yourself down by on-the-go proof-editing will pay off at the revision stage when some of those awfully written sentences get chopped in the end anyway. Much of the careful grooming during the drafting stage will have been a waste of time.

5. Courtesy

No matter what kind of document you're writing and what you can expect your audience's reaction to it to be, writing courteously so that your reader feels respected is fundamental to reader-friendly messages. Whether you're simply sharing information, making a sales pitch, explaining a procedure, or doing damage control, using polite language helps ensure your intended effects—that your reader will be receptive to that information, will buy what you're selling, will want to perform that procedure, or will be onboard with helping to fix the error. The cornerstone of polite language is obviously saying “the P-word” that you learn gets what you want when you're 18 months old—because saying *please* never gets old when asking someone to do something for you, nor does saying *thanks* when they've done so—but there's more to it than that.

Much of courtesy in writing involves taking care to use words that focus on the positive, improvement, and what *can* be done rather than those that come off as being negative, critical, pushy, and hung up on what can't be done. If you're processing a contract and the client forgot to sign and date it, for instance, the first thought that occurs to you when emailing to inform them of the error may go something like the following:

You forgot to sign and date our contract, so you've got to do that and send it to me a.s.a.p. because I can't process it till I receive it signed.

Now, if you were the client reading this slightly angry-sounding, accusatory order, you would likely feel a little embarrassed and maybe even a little upset by the edgy, pushy tone coming through in negative words like *forgot*, *do that*, *a.s.a.p.*, and *can't*. That feeling wouldn't sit well with you, and you will begin to build an aversion to that person and the organization they represent. (If this isn't the first time you forgot to sign a contract for them, however, the demanding tone would be more justified or at least more understandable.) Now imagine you read instead a message that says, with reference to the very same situation, the following:

For your contract to be processed and services initiated, please sign, date, and return it as soon as possible.

You would probably feel much better about coming through with the signed contract in short order. You may think that this is a small, almost insignificant shift in meaning, but the difference in psychological impact can be quite substantial, even if it operates subconsciously. From this example you can pull out the following three characteristics of courteous writing.

a. Use the "You" View

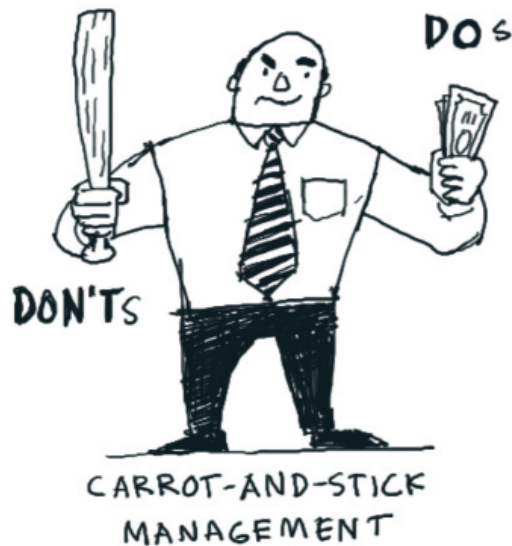
Audience-oriented messages that address the reader directly using the pronouns *you* and *your* have a much greater impact when the message is positive or even neutral. Writing this way is a little counterintuitive, however, because when we begin to encode any message into words, we do so naturally from our own perspective. The sender-oriented messages that result from our perspective don't register as well with readers because they use first-person personal and possessive pronouns (*I*, *me*, *my*, *we*, *us*, and *our*) that tend to come off as being self-involved. In the above case, the contract is shared by both parties, but saying "our contract" is a little ambiguous because it may be read as saying "the employer's contract" rather than "your and my contract." Saying "your contract," however, entitles the reader with a sense of ownership over the contract, which sits much better with them.

The trick to achieving audience-oriented message is to catch yourself whenever you begin writing from your perspective with first-person personal pronouns like *I* and *my*, and immediately flip the sentence around to say *you* and *your* instead. Simply changing the pronouns isn't enough, though; in the above case, it involved changing the wording so that the contract is sent by you rather than received by me. Switching to the audience perspective takes constant vigilance and practice even from seasoned professionals, but soon leads to an audience-oriented habit of writing that endears you more to your readers and leads to positive results. An added benefit to habitually considering your audience's perspective is that it makes you more considerate, sympathetic, and even empathetic, improving your sense of humanity in general.

The flipside of this stylistic advice is to use the first-person pronouns (*I*, *we*, etc.) as seldom as possible, which is true, but obviously you can't do without these entirely—not in all situations. When it's necessary to say what you did, especially when it comes to negative situations where representing your perspective and accepting responsibility is the right thing to do, not using the first-person pronouns will result in awkward stylistic

acrobatics. Simply use the audience-oriented “you” view and sender-oriented first-person personal pronouns when appropriate.

b. Prioritize Audience Benefits



Whenever you need to convince someone to do something, leading with the positive result—what the reader will get out of it for their effort—followed by the instruction has a much better chance of getting the reader on board. Notice in the two example sentences above that the reader-hostile version places the demand before the result, whereas the improved, reader-friendly version places the result before the (kindly worded) demand. This simple organizational technique of leading with the audience benefit works because people are usually more motivated by the carrot (reward) than the stick (consequence), and dangling the carrot attracts the initial interest necessary to make the action seem worthwhile. It’s effective because it answers what we can always assume the reader is wondering: “What’s in it for me?”

Messages that don’t immediately answer that question and instead lead with the action, however, come from a sender-oriented perspective that initially turns off the reader because it comes off as being demanding in tone. Obviously, some situations require a demanding tone, as when being nice gets no results and necessity forces you to switch to the stick. Again, leading with the demand may be what occurs to you first because it addresses your immediate needs rather than your reader’s, but making a habit of flipping it around will give your writing greater impact whenever you give direction or issue instructions.

c. Focus on Future Positive Outcomes

Focusing on what can be done and improvement sits better with readers than focusing on what can’t be done and criticism. In the above case, the initial rendering of the problem focused on blaming the reader for what

they did wrong and on the impasse of the situation with the contract. The improved version corrects this because it skips the fault-finding criticism and instead moves directly to what good things will happen if the reader does what needs to be done. The reader of the second sentence will associate you with the feeling of being pleased by the taste of the carrot rather than smarting from the whack of the stick.

The flipside of this stylistic preference involves replacing negative words with positive words unless you have an important reason for not being nice. Being vigilantly kind in this way takes some practice, not because you're a bad person but because your writing habits may not reflect your kindness in writing. Vigilance here means being on the lookout whenever you're tempted to use the following words or their like in situations that aren't too dire:

- awful
- bad / badly
- can't / cannot
- crappy
- deny
- disappointing
- don't
- dumb
- fail / failure
- fault / faulty
- hate
- hopeless
- horrible
- impossible
- lose / loser
- never
- no / nope
- nobody
- not
- poor / poorly
- reject
- sorry
- stupid
- substandard
- terrible
- unfortunate / unfortunately
- won't

- worthless

Rather than shaming the author of a report by saying that their document is terrible, for instance, calling it “improvable” and pointing out what exactly they can do to fix it respects the author’s feelings and motivates them to improve the report better than what you really want to say in a passing moment of disappointment. Of course, taking this advice to its extreme by considering it a hard-and-fast rule will obviously destroy good writing by hindering your range of expression. You’ll notice that this textbook uses many of the above words when necessary. In any case, make it a habit to use positive words instead of negative if it’s clear that doing so will result in a more positive outcome.

On its own, translating a single sentence like the one exemplified above will likely not have a lasting effect; over time, however, an habitual focus on negative outcomes and use of negative language will result in people developing a dislike for dealing with you and, by association, the company you represent. If you make a habit of writing in positive words most of the time and use negative words only in situations where they’re necessary, on the other hand, you stand a good chance of being well liked. People will enjoy working with or for you, which ensures continued positive relations as well as opens the door to other opportunities.

6. Convincing and Confident

When all the other aspects of style described above are in working in concert, and when the information your writing presents comes from sound sources, it naturally acquires an air of confidence that is highly convincing to readers. That confidence is contagious if you are rightfully confident in your information or argument, decisive in your diction, and avoid lapsing into wishy-washy, noncommittal indecision by overusing weak words and expressions like:

- almost
- approximately
- basically
- blah
- close to
- could (have)
- -esque
- -ish
- kind of / kinda
- may / maybe
- meh
- might
- probably

- roundabout
- somewhat
- sort of / sorta
- should (have)
- thereabouts
- usually
- we'll see
- whatever
- whenever
- whichever
- -y (e.g., orange-y)

These timid, vapid words are death to any sales message especially. This is not to say that your writing can't err toward overconfidence through lapses in judgment or haughtiness. If you apply the same rigour in argument and persuasion that you do in selecting for quality research sources that are themselves well reasoned, however, by considering a topic holistically rather than simplistically for the sake of advancing a narrowminded position, it's easy to get readers to comprehend your information share, follow your instruction, buy what you're selling, and so on.

Key Takeaways



Drafting involves writing consistently in a formal, casual, or informal style characterized by the “Six Cs”: clarity, conciseness, coherence, correctness, courtesy, and conviction.

Exercises



1. Assemble a Six-Cs scoring rubric for assessing professional writing using the

descriptions throughout §4.5.2 above. In the highest-achievement column, list in point-form the attributes of each characteristic. In the columns describing lesser and lesser levels of achievement, identify how those expectations can fall apart. For help with the rubric form, you may wish to use Rubistar's writing rubric template.

2. Find examples of past emails or other documents you've written that make you cringe, perhaps even high school essays or reports. Identify instances where they are unclear, unnecessarily longwinded, incoherent (lacking both a clear organizational pattern and transitions that drive the argument along), rife with writing errors, rude, and/or unconvincing. Assess and score those specimens using your Six-Cs rubric from Exercise 1 above. Begin to think of how you would improve them (a future exercise in Ch. 5 will ask you to revise and proof-edit them).

3. Find a professionally written document, perhaps from a case study in another class. Assess it using the same Six-Cs scoring rubric.

4. Speed-write a written assignment that you've been recently assigned in one of the other courses in your program. If you're not fast at typing (or even if you are and want to try something new), you may start by recording your message into your smartphone's or computer's voice recorder app or program and then transcribe it. Ensure that your style hits five of the six style Cs (clarity, conciseness, coherence, courtesy, and conviction) as you write and most definitely do not correct as you go.

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4.6: EFFECTIVE DOCUMENT DESIGN

Learning Objectives



3. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
4. Apply the principles of reader-friendly document design to various written formats.

The responsibility of a writer to produce reader-friendly documents extends to layout, design, and organizational elements surrounding the words themselves. If an email or report were simply a wall of undifferentiated text running for several screens or pages, any reader would be daunted by the prospect of having to scale that wall. Fortunately, writers can use document templates that make those design choices for them with established styles so that writing a document becomes a matter of just filling in the blanks; if you work for a company that uses templates for certain documents, of course you will use them also for consistency and your own convenience. Even without templates, however, you can use several techniques to help guide your readers' eyes across the page or screen to easily find what they're looking for. Rather than being optional nice-to-haves, such techniques are crucially important to how well your document is received.

- 4.6.1: Titles
- 4.6.2: Headings and Subheadings
- 4.6.3: Font
- 4.6.4: Line Spacing
- 4.6.5: Lists
- 4.6.6: Visual Aids
- 4.6.7: Interactive Elements
- 4.6.8: Balancing Text and Whitespace
- 4.6.9: Making Accessible, AODA-compliant Documents

4.6.1: Titles

Almost every document that exists as a standalone unit must have a title that accurately represents its contents in a nutshell. It's the first thing a reader looks for to understand what a document is all about and should thus be easily found centred at the top of the first page of any small document, and prominently placed on the cover of larger documents (see §7.3–4 on report cover pages and cover images). Though some documents represent exceptions to this rule (e.g., business letters lack titles, and many lack subject lines), any document that brings with it the expectation of a title but omits it is like a grotesquely decapitated body; readers just won't know what to make of it. Even emails and memos have titles in the form of subject lines (see §6.1 and §7.2 below). In whatever document you find it, a title's following characteristics make it essential to your reader's understanding of the whole:

- **Topic summary:** A title is the most concise summary possible of a topic while still making sense. If you glance at a news website or newspaper, for instance, you can get a reasonably good sense of what's going on in the world just by reading the headlines because they are titles that, in as few words as possible, summarize the narratives told in the articles that follow.
- **Conciseness:** Aim for a length in the 2- to 7-word range—something that can be said repeatedly in one short breath. One-word titles are appropriate only for art (e.g., for books, films, songs, albums, etc.), but most other professional documents use a reasonable number of words to give a sense of the topic, albeit streamlined to the point of having no words that don't absolutely need to be there. In scientific papers, titles can be quite long and carry plenty of detail, though you can expect that their audiences will rarely pronounce the full title.
- **Capitalization:** Capitalize the first word no matter what, as well as all major words (nouns, verbs, adjectives, adverbs, pronouns, etc.) thereafter.
 - Don't capitalize prepositions (e.g., *on*, *to*, *from*, *in*, *out*, *of*), conjunctions (*and*, *but*, *or*, *for*, *nor*, *so*, *yet*), nor articles (*the*, *a*, *an*) unless they're the first word of the main title or subtitle (Darling, 2014a, 2014b, 2014c).
 - When including a hyphenated word (i.e., with a compound-modifier hyphen), leave the second word, the one immediately following the hyphen, lowercase (see the first two examples in the titles listed at the end of this subsection).
- **Structure:** Use a noun, verb, or adjective phrase rather than a complete sentence.
 - **Main title:** If your title comes in two parts with a main title and subtitle, the main title establishes the general context of the topic, perhaps with catchy or clever phrasing, and ends with a colon (:) with a single space after it but none before.
 - **Subtitle:** The subtitle follows the main title with a more specific and detailed summary of the document topic.

- **Position:** Centre the title at the top of the page and include 1-2 empty lines below it to separate it from the opening text.
- **Typeface:** Use bold typeface to help draw the eye towards the title, as well as colour if appropriate.

For examples of titles that are near at hand, see the References sections at the end of most chapter sections throughout this textbook. The following collects a small selection of them:

- “Consensus on Consensus: A Synthesis of Consensus Estimates on Human-caused Global Warming” (Cook et al., 2016)
- “Fake News: Facebook and Matters of Fact in the Post-truth Era” (White, 2017)
- “Instagram Ranked Worst for Young People’s Mental Health” (RSPH, 2017)
- “Gray Matters: Too Much Screen Time Damages the Brain” (Dunckley, 2014)
- “Higgs Boson Researchers Mocked for Using Comic Sans Font” (CBC, 2012)
- “Ottawa Severs Ties with Plasco as Company Files for Creditor Protection” (Chianello & Pearson, 2015)
- “Problematic Technology Use: The Impact of Capital Enhancing Activity” (Phillips, 2015)
- *The Process and Effects of Mass Communication* (Schramm, 1954)
- “Understand How Consumers Use Messaging: Global Mobile Messaging Consumer Report 2016” (Twilio, 2016)
- “Who Multi-tasks and Why? Multi-tasking Ability, Perceived Multi-tasking Ability, Impulsivity, and Sensation Seeking” (Sanbonmatsu et al., 2013)

For more example titles, go to *Wikipedia.org* and search for articles on any business or technology topic, scroll down to the References section at the bottom, and see an abundance of legitimate titles.

4.6.2: Headings and Subheadings

After the main title of a document, using headings and subheadings as titles for sections and subsections helps guide the reader around a document’s breakdown of topics. Especially in reports, headings and subheadings that stand out in bold typeface flush (or close) to the left margin and follow a consistent numbering system, exactly as you see in this textbook, help a busy reader quickly locate any specific content they seek. Even a routine email that covers a topic in so much detail that it could be internally divided—without being so big that its content should just go into a document attachment—would benefit from bolded headings (see §6.1 for more on emailing).

If your drafting process follows the guide in this chapter, then you would have already drafted your headings and subheadings (and possibly numbering if necessitated by the size of the document) in your outline (see §4.2

above). The drafting process of fleshing out that outline may suggest tweaks to those heading and subheading titles. As titles, headings must be properly phrased and capitalized like main titles (see §4.6.1 above).

When using a word processor such as Microsoft Word, you can achieve additional functionality by using “true headings.” From the Home menu tool ribbon, heading styles are available as options in the Styles section. If you prefer to design your own styles of headings, you can click on the downward triangle at the bottom right of the style examples field and select “Create a Style.” Doing this allows you to see your entire document at a glance on the left and quickly jump to any section you wish by clicking on the Navigation Pane checkbox in the Show section of the View menu tool ribbon (or Alt + w, k), then clicking on the heading for the section you want. This is especially useful in larger documents like reports. Additionally, using such headings makes your document accessible to audiences with assistive technologies such as screen readers (see §4.6.9 below on AODA compliance).

4.6.3: Font

Font selection is an important consideration because it determines how the audience will receive a document. Font involves decisions concerning the style of type, size, and even colour. Consider the following:

1. Font Type

Times New Roman

Garamond

Arial

Verdana

Comic Sans

Papyrus

COPPERPLATE

Writers considering typeface must choose between two major style categories depending on how they would like to accommodate their reader. **Serif fonts** like **Times New Roman** and **Garamond** have little perpendicular crossline “feet” or “hands” at the ends of letter strokes, as well as variable thickness in the strokes themselves depending on their horizontal/vertical or curving position, which altogether help readers distinguish between similar letters or combinations of letters, such as *m* and *rn*,

which almost look like the same letter in a non-serif font. Serif fonts are ideal for printed documents, especially those with smallish font sizes such as newspapers. Without serifs, **sans-serif fonts** like **Arial** (the one used in this textbook) or **Verdana** achieve a more clean and modern look, especially on computer screens where serif fonts appear to whither away at the thin part of the stroke and are thus harder to read. In the appropriate format, all the fonts mentioned above make a document look respectable. **Comic Sans**, on the other hand, is appropriate for documents aimed at children, but undermines the credibility of any professional document, such as when the unfortunate choice to use it when reporting CERN particle physics discoveries became more newsworthy than the discoveries themselves (CBC, 2012).

Anticipate that audiences might care about font choices, especially if the font clashes with the content like the example above. To anyone who considers the effects that fonts have on an audience, even going with the Microsoft Word default font of **Calibri** has its dangers because it comes off looking lazy, being the non-choice of those who never consider the importance of font. At the other extreme, digging around for and using exotic fonts for a document is risky because they can look flakey, such as **Papyrus** or Copperplate (Butterick, 2013). Even if they look nice, however, the receiver opening the document on the other end may not have that font in their word processor program, requiring that program to substitute it with another font, which may look worse or mangle layouts arranged around that font. The safe bet, then, is always to go with familiar, respectable-looking serif or sans serif fonts like those identified at the top of this subsection.

2. Font Size

Size is another important consideration because readers depend on text being an ideal “Goldilocks” size for readability and are frustrated by font sizes that are bigger or smaller than that. In a standard written document, for instance, a 12-point Arial or Times New Roman is the Goldilocks size. If the MS Word default size when you open a blank document is 11-point, it’s worth increasing it for the sake of those who have slight visual impairment. Increasing the size much past 12-point has a similar effect as using the Comic Sans font type: it makes your document appear to be targeting an audience of children. Of course, situations where you want to increase the font size abound, such as for titles on title pages so that the eye is drawn immediately to them, and any time readers are required to read at a distance, such as posters on a notice board or presentation slides. As we shall see in §11.5 below, the ideal font size for bullet points in a PowerPoint is in the 30- to 35-point range, whereas a 12-point font will appear microscopic on a projector screen, if not invisible, from across the room.

Occasions for going smaller with your font size include footnotes in a report or source credits under images in a document or PowerPoint presentation. Decreasing font size to 8-point merely to get all your text to fit into a one-page résumé, however, would undermine the document’s purpose because, by frustrating the hiring manager trying to read it, it runs the risk of prompting them to just dump it in the shredder and move on to the next (hopefully reader-friendly) résumé. In such cases, choosing the right font size becomes a major life decision. Whatever the situation, strike a balance between meeting the needs of the reader to see the text and design considerations.

3. Font Colour

A choice of colour may also enter into document design considerations, in which case, again, the needs of the reader must be accommodated. Used appropriately, a touch of colour can draw the eye to important text. Colouring your name red at the top of your résumé is effective if few or no other elements in the document are so coloured because your name is essentially the title of your document (see §8.2 below). Likewise, colouring the title of other documents is effective if there are no expectations of doing otherwise (some style guidelines forbid colour).

Any use of colour for text must be high-contrast enough to be readable. The gold standard for high-contrast readability is black text on a white background. Grey-on-white, on the other hand, sacrifices readability for stylishness depending on how light the shade of grey is. A light-yellow text on a white background is nearly impossible to read. In all cases, the readability of the text should be considered not just for those with perfect vision, but especially for those who find themselves anywhere on the spectrum of visual impairment (see §4.6.9 on accessibility below). For this reason, colour should always be used to enhance a document that is already perfectly organized without it; never use colour-coding alone as an organizing principle in a document read by anyone other than you because you can never be sure if some readers will be colour blind or have other visual impairments that render that colour coding useless as a cause for confusion.

4. Boldface, Italics, and Underlining

Boldface, *italics*, and underlining serve various purposes in focusing audience attention on certain words. Boldface type is especially helpful in directing audience eyes towards titles, headings, and keywords as you can see at the beginning of this paragraph and throughout this textbook. Highlighting in this way is especially helpful to anyone who is visually impaired in any degree. Of course, overusing boldface undermines its impact, so it should be used sparingly and strategically. Likewise, italics and underlining have very specific purposes that we will look at under the banner of mechanics in §5.4 below.

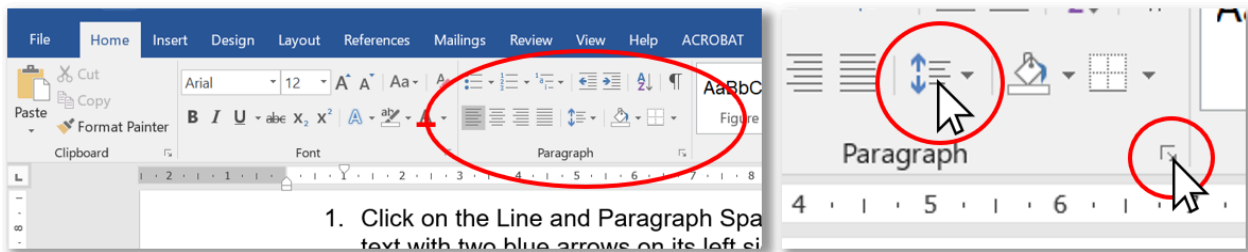
4.6.4: Line Spacing

Single-spaced lines are common to most documents because they accommodate the reader's need to dart quickly to the next line to continue reading a sentence. The gap between 1.0-spaced lines is just enough to clearly separate one line from another so the hanging elements at the bottom of letters like *j* and *g* don't interfere with the tops of uppercase letters on the line below. Some documents such as academic manuscripts are double-spaced to give readers, who are usually the instructors or teaching assistants grading them, enough space to write comments and editorial marks between the lines. Because doubling the line spacing also doubles

the number of pages in a print version, avoid double-spacing documents for audiences who don't explicitly require it.

Frustratingly, some word processors such as Microsoft Word open blank pages with line spacing values other than single (1.0) spacing as their default setting, such as 1.08 or 1.15. In such cases, a couple of adjustments are necessary if you want to single-space a document you're writing from scratch. Make these adjustments as soon as you open a blank page or by highlighting all (ctrl. + a) if you've already started. In MS Word's Home menu:

1. Click on the Line and Paragraph Spacing icon that has four lines representing text with two blue arrows on its left side, one pointing up and one down, in the Paragraph section of the Home menu ribbon (or just type the *Alt + h, k* keys).



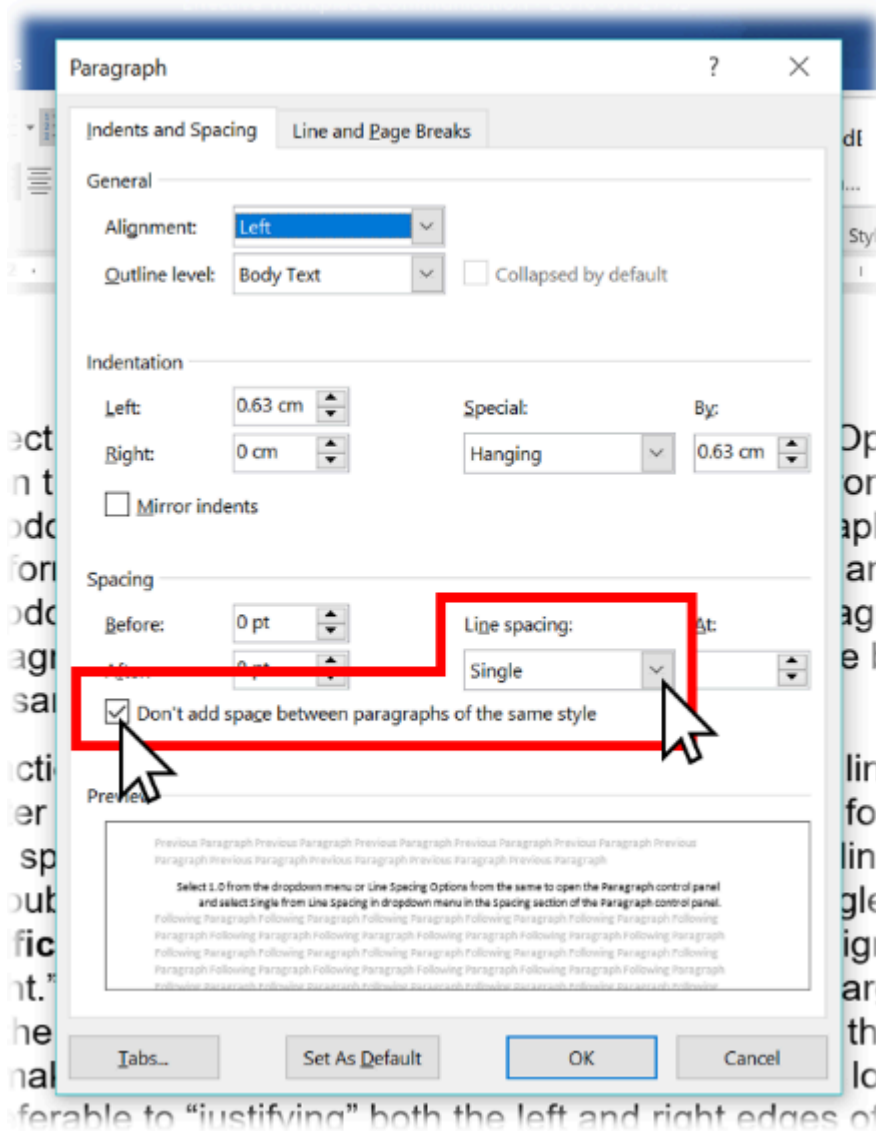


Figure 4.6.4a: Where to click

- to get line-spacing options in the MS Word tool ribbon (above) and Paragraph control panel (right)
- Select 1.0 from the dropdown menu or Line Spacing Options from the same to open the Paragraph control panel and select Single from the Line Spacing dropdown menu in the Spacing section.
- Perform the same two steps as above to get the Line and Paragraph Spacing dropdown menu and select Remove Space After Paragraph or, from the Paragraph control panel, click on the “Don’t add space between paragraphs of the same style” checkbox and the Okay button at the bottom to apply the style.

The third action above prevents MS Word from adding a full line of space every time you hit Enter at the end of a line. When typing address lines for a letter without the “Don’t add space” checkbox ticked, for instance, the default line spacing will continue to look like double spacing even if you set the line spacing to single.

Justification should ideally be left as the default left-aligned or “Left-justified / ragged right.” This means that all lines are flush to the left margin and the lines end wherever the last full word fits before the right margin sends (or “wraps”) the next word down to the next line, making each line vary in length so the right margin

looks “ragged,” as you can see throughout this textbook. This is usually preferable to “justifying” both the left and right edges of the text so that they align perfectly along both the left and right margins, as in the paragraph below. While this may look clean like newspapers often do with their columns, it does so by adding space between the words within each line, and since every line varies in length without justification, every line with it will vary in the amount of space added between words. Some lines that would be short without justification look awkward with it because the space between some words is greater than the span of small words.

To fix the “hockey teeth” gaps resulting from justification such as what you see in parts of this paragraph, turn on hyphenation in MS Word via the Layout tool ribbon: select Automatic in the Hyphenation dropdown menu in the Page Setup section. This automatically adds hyphens between syllables of long words whose size and position at the end of a line would otherwise send them entirely to the beginning of the next line, decreasing the number of words in the line above and increasing the gap between each. If working in a company document template with justification, keep the justification throughout to be stylistically consistent with other documents produced in that template and ensure that the hyphenation is turned on (unlike this paragraph). Otherwise, left-aligned text is perfectly fine and may even help readers find their place if they lose it momentarily compared with the uniform brick-wall effect of justified text seen here.

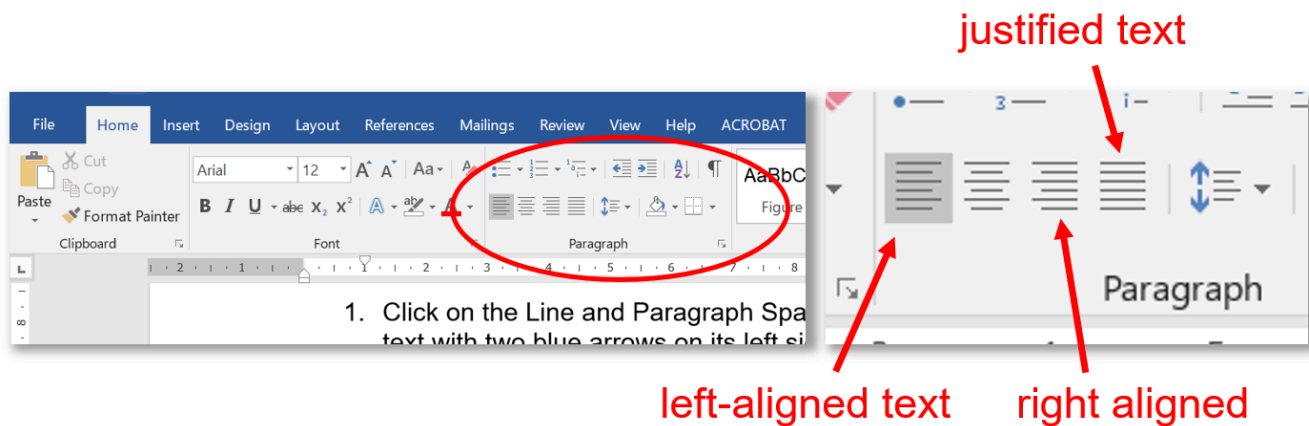


Figure 4.6.4b: Where to click to select text justification or left-aligned (“ragged right”) text in the MS Word Home menu tool ribbon

To fix the “hockey teeth” gaps resulting from justification such as what you see in parts of this paragraph, turn on hyphenation in MS Word via the Layout tool ribbon: select Automatic in the Hyphenation dropdown menu in the Page Setup section. This automatically adds hyphens between syllables of long words whose size and position at the end of a line would otherwise send them entirely to the beginning of the next line, decreasing the number of words in the line above and increasing the gap between each. If working in a company document template with justification, keep the justification throughout to be stylistically consistent with other documents produced in that template and ensure that the hyphenation is turned on (unlike this paragraph). Otherwise, left-aligned text is perfectly fine and may even help readers find their place if they lose it momentarily compared with the uniform brick-wall effect of justified text seen here.

4.6.5: Lists

Another technique that helps the reader skim and easily find sought-after content is numbered or bulleted lists for a series of discreet but related items. Whether you use numbered or bulleted lists depends on your organizing principle:

Use Numbered Lists for a:

- An unprioritized collection of related points
- Sentences under a heading in an email or note-form points on a presentation slide (e.g., PowerPoint) for easier readability

Use Bulleted Lists for:

- Step-by-step **procedure** such as a set of instructions
 - Description of a **chronological sequence** — a series of events unfolding in time
 - **Rankings** that arrange items in priority order
-

You’ve seen numbered and bulleted lists used throughout this textbook (e.g., the two bulleted lists immediately above and a numbered one in the section prior to this). Whichever list type you use, ensure each has the following:

- A **sentence or phrase** introducing and explaining the list and ending with a colon (see Colon Rule 1 in Ch. 5 below) before delivering the list immediately below it as you can see in the sentence that introduces this list
- **Capitalization** of the first letter in each point
- **Periods** ending each point only if it is a complete sentence on its own, whether it be in the declarative, imperative, or any other mood (see Table 4.3.1 above); a list of nouns or noun phrases, on the other hand, doesn’t end in periods
- **Parallelism** in the sense that each point in a list follows the same grammatical pattern, such as only full sentences, only noun phrases, or only verb phrases (or imperative sentences; recall Table 4.3.1 for more on imperative sentences); for instance, each point in the three bulleted lists in this section (including the present one) is a noun phrase (i.e., it begins with a noun) and the numbered list in §4.6.4 above, as a step-by-step procedure, is a sequence of imperative sentences (i.e., each begins with a verb: “Click,” “Select,” “Perform”).

The need for parallelism extends also to lists within a sentence. See §5.2 below for more on how to correct for faulty parallelism.

4.6.6: Visual Aids

The cliché that a picture is worth a thousand words holds true because images are excellent aids to understanding when placed near the messages they illustrate. Just as the visual elements in this textbook support and reinforce the content, such as those in §4.6.4 above, so photos, graphics, charts, and graphs provide readers something that can be understood and remembered at a glance—as long as those visuals are used appropriately. Of course, the main criterion for usability is if the image helps the reader understand the text better. If the image is complementary, it can only help. If it is unnecessary, confusing, or contradicts the text, however, the image isn't worth the time and effort it takes to add it to your document. When considering using an image, ask yourself:

- **Aesthetic considerations:**
 - Does the image look good?
 - Are the colours complementary?
- **Technical considerations:**
 - Is the image resolution of sufficiently high quality?
 - Or is it too pixelated to use?
- **Legal considerations:**
 - Does the image's copyright licence permit or forbid use by others?
 - Am I using the image for educational or commercial purposes?
- **Design considerations:**
 - Is it big enough to see?
 - Is it placed appropriately?

The ideal size depends on the resolution, detail of the content, relative importance, and the use to which the document will be put. The following guidelines help ensure that the images you use will meet aesthetic, design, technical, and legal expectations:

- **Aesthetic guidelines:**
 - Choose images that look like they were produced by professional photographers, illustrators, or graphic designers—the sort you would see in a magazine or professional industry website.
 - Professionals usually produce images with a limited palette of colours that work well together.
 - Use images that are in focus and well-framed with the central image clearly visible rather than too far in the background or so close that important aspects are cropped out.

- **Design guidelines:**

- An image or graphic that is crucial to the reader's understanding and is highly detailed really deserves to stretch across the text block from margin to margin.
- An image that is more ornamental and relatively simple can be inset within the text either on the left or right margin, or centred on the page without text on either side.
- Important images, especially those labelled as figures, must be placed as near as possible to the text they support and even referred to in the text ("See Figure 2 for an illustration of . . .")
- Ensure that the text and corresponding image aren't separated by a page break if the text is close to the top or bottom of the page. The reader's eye must be able to move between the image and corresponding text in the same field of view to seal their understanding.

- **Technical guidelines:**

- Screen resolution must be at least 72dpi (dots per inch), the internet standard; anything less than 72 may appear pixelated even on the screen, especially if maximized in size across the page.
- Images in documents that will be printed should be 300dpi to avoid appearing pixelated on paper.
- Preferred image file types include JPEG (.jpg) and PNG (.png). The latter includes the possibility of contouring so that the image doesn't necessarily have to be a square or rectangle. You can make a PNG image file of your handwritten and scanned signature, for instance, by erasing the white background around the pen strokes in Photoshop and saving the image as a PNG. That way, you can drag and drop your signature onto a signature line in an electronic document and it won't block out the line underneath if your signature typically sprawls out over lines.

- **Legal guidelines:**

- To stay on the right side of copyright legislation, searching online for images that are free to use is easy by including licensing status in an advanced Google Image search. From the Google Images search screen:
 1. Click on the Settings spring-up menu at the bottom right.
 2. Select Advanced Search.
 3. Scroll down and click on the "usage rights" dropdown menu at the bottom.
 4. Select "free to use or share" or whatever licensing status suits your purposes.
- Otherwise, you can acquire the right to use images for commercial purposes by purchasing them from stock photo vendors such as Getty Images, Adobe Stock, or Shutterstock.

With modern word processors, placing an image is as easy as dragging and dropping the image file from a folder into a document (or copying and pasting). Sometimes you will need to be a little craftier with capturing images,

however. For instance, if you need to capture a still image of a YouTube video to use as an image such as you see near the end of §4.3.4 above, you can pause the video at the moment you would like to capture and use your computer's screen-capturing program to get the image.

- On a Windows-based computer:
 1. Open the included Snipping Tool (Microsoft Support, 2017) to turn the cursor into crosshairs.
 2. Click and drag the crosshairs to select the desired portion of the screen for capturing; when you release the cursor, the captured image will open immediately in the clipboard. Ensure that you've included only the elements necessary, rather than the whole screen, plus a short span of margin on each side.
 3. Save the image in a folder from the clipboard or add it directly to the document by switching immediately to the document window (Alt + tab) and pasting it (ctrl. + v) wherever you've placed your cursor.
- On a Mac, use Shift + Command + 4 and use the crosshairs to select the desired portion of the screen (Apple Support, 2017).

Once your image is in your document, use the layout options to place it where appropriate. Clicking on it may produce a layout icon near the top right that you can click on to open the dropdown menu (alternatively, you can right-click on the image and select the Wrap Text option from the dropdown menu). The default setting left-justifies the image and displaces the text around where you put it, but other layout options allow you to place it elsewhere on the page so that your text wraps around it ("Square," "Tight," or "Through") or so that text doesn't move around it at all ("Behind" or "In front of text"), which gives you the freedom to move the image anywhere.

See §3.5.5 above for further information on labelling an image according to APA style guidelines and §4.6.9 below on alt-text captioning images for accessibility.

4.6.7: Interactive Elements

Another aid to understanding that can benefit readers of an online or electronic document is a weblink that provides them with the option of accessing other online media. Hyperlinking is easy in modern word processors and online applications such as websites and email simply by highlighting text or clicking on an image and activating the hyperlinking feature. Press the control and k keys simultaneously (Ctrl + k), paste the web address into the URL field (copy it by clicking on the web address bar or keying Alt + d, then Ctrl + c), and hit the Okay button (Microsoft Office Support, 2016). Users prefer links that open new tabs in their browser rather than take them away entirely, so seek out that option when hyperlinking. By doing this for an

image of a YouTube video screenshot, for instance, you enable readers of a document (including a PowerPoint presentation) to link directly to that video in YouTube (as you can with the YouTube image near the end of §4.3.4 above) rather than embed a large video file in your document. You can additionally link to other areas within a document, as the document version of this textbook does with links to various sections like the one in the previous sentence.

4.6.8: Balancing Text and Whitespace

Another consideration that helps a reader find their way around a page is the balance of text and whitespace, which is simply a gap unoccupied by text or graphic elements. The enemy of readability is a wall of text that squeezes out any whitespace, whereas a well-designed document uses whitespace to usher the reader's eyes towards units of text. Whitespace margins frame the text in a document, for instance, as well as give readers something to hold on to so that they don't cover up any text with their thumbs. Margins should be 3cm or 1" (2.54cm), which are the default margin sizes in most word processors' (e.g., Microsoft Word's) blank 8.5"x11" document. Margins also focus attention on the text itself, which makes any crowding of the margins an offense to good design. An attempt to cram more information into a one-page résumé by edging further and further into the margins, for instance, follows the law of diminishing returns: the hiring manager might take your sacrifice of the document's readability as a sign of selfishness—that you place your own needs above that of your audience, which suggests you would do the same to the customers and management if it suited you (see §8.2 below for more on résumés).

4.6.9: Making Accessible, AODA-compliant Documents

The Accessibility for Ontarians with Disabilities Act (2005) sets out guidelines for how workplaces can help people with disabilities, including accommodations that extend to document design. Many of the recommendations covered in the sections throughout §4.6 above, such as font size and colour, are justified as accommodations to people with even mild visual impairment. Someone with colour blindness, for instance, may be confused if you use coloured text alone as an organizing principle, which is why you should use colour only to enhance text readability while using other means of organization such as boldface type (see §4.6.3.4 above). Not only must you accommodate such individuals, but also those whose severity of impairment requires that they use assistive technologies such as screen readers that convert text to automated voice. The more straightforward your text is presented, as well as formatted with “true headings” that a screen reader can identify as headings, the easier a person with a disability can hear and understand your message when it's read out by a screen reader.

Once you are done drafting your document, you can begin to check for any accessibility issues and act on them right away. In MS Word, just to go to File and, in the Info tab, select the “Check for Issues” button in the Inspect Document section. It will identify accessibility problems in your document as well as suggest fixes (watch the video below for a demonstration). For instance, if you have a photo without alt text, it will prompt you to write a caption by right-clicking on the image, selecting “Edit Alt Text...” from the dropdown menu, and writing a one- or two-sentence description of the image so that users with screen readers will be able to hear a description of the image they can’t see very well or at all. See the Creating Accessible Documents resources (Algonquin College, 2013) for more on how to make your documents AODA compliant.

[https://youtu.be/mSY2EyA0rH4\[/embed\]](https://youtu.be/mSY2EyA0rH4[/embed])

Key Takeaways



Make your document easy to follow at a glance and accessible by using a variety of document design features such as titles, headings/subheadings, lists, visual aids, interactive elements, line spacing, and appropriate font types, sizes, and colours.

Exercises



1. Collect a variety of professional documents, such as reports, memos, and letters. If you have perfect vision, impair your vision perhaps by dimming the lights at night or using a friend’s or family member’s prescription glasses. What do you notice about the readability of those documents when you’ve limited your eyesight? What organizational elements do you especially appreciate when trying to make sense of the document when you’ve otherwise hindered your ability to read?
2. Take any multi-page assignment you’ve done in MS Word that also includes non-text elements like photos. Run an accessibility check on it using the procedure described in §4.6.9 above and fix the issues identified.

3. Produce a dummy document that follows guidelines in each of the §4.6 subsections above. The content doesn't much matter so much as the inclusion of features. Ensure that it has:

- i. A proper title
- ii. Some headings and subheadings
- iii. A well-chosen font
- iv. Single-spacing (1.0 with the “Don't add space” checkbox checked)
- v. A numbered and a bulleted list A properly labeled image
- vi. A hyperlink
- vii. Nicely balanced
- viii. An accessibility check that you act upon by following the recommended fixes for AODA compliance whitespace and text

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CHAPTER 5: THE WRITING PROCESS IV: EDITING

Jordan Smith

Chapter Learning Objectives

1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Whatever you do, don't quit now! Self-correction is an essential part of the writing process, one that students or professionals skip at their peril. Say you've just dashed off a quick email. Glancing back to ensure that it's correct in terms of its grammar, punctuation, spelling, and mechanics helps you avoid confusing your reader or embarrassing yourself. Those errors can be like stains on your shirt or rips in your uniform: they give the impression that you're incompetent or uncaring—qualities no employers respect because it suggests a lack of attention to detail.

Always keep in mind that people generalize to equate the quality of your writing with the quality of your work. Because readers tend to be judgmental, they may even draw bigger conclusions about your level of education, work ethic, and overall professionalism from even a small writing sample. Especially with résumés and cover letters where your words are the first impression employers have of you, employers are judgmental about your writing because customers can be. Employers don't want you to represent their company to customers in a way that makes it look like the whole organization does shoddy, amateur work.

The final stage of the writing process is thus managing your readers' impressions by editing your draft from beginning to end. This involves first returning to your headspace at the start of the writing process and assessing where your document is in relation to the purpose you set out to achieve for it (see Step 1.1 in §2.1 above). When you get a sense of how far your document is from achieving that primary purpose, you realize what needs to be done to close that gap—what you need to add, rewrite, delete, and improve. Your next move is a two-step editing process of substantial revisions and proof-editing. The order of these is crucial to avoid wasting time. You wouldn't proofread for minor grammatical errors before substantial revisions because you may end up just

deleting altogether paragraphs that you meticulously proofread with a fine-tooth comb. We'll therefore divide the process into lessons you can apply to the editing process in the following order:

- 5.1: Substantial Revisions
- 5.2: Proofreading for Grammar
- 5.3: Proofreading for Punctuation
- 5.4: Proofreading for Spelling
- 5.5: Proofreading for Mechanics

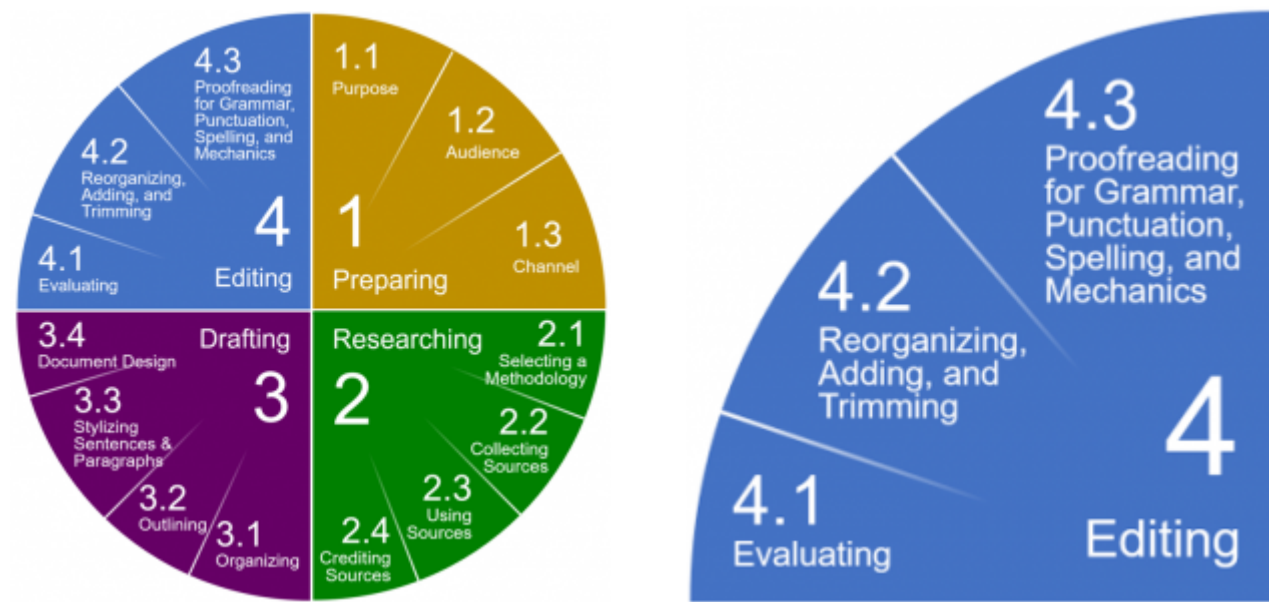


Figure 5: The four-stage writing process and Stage 4 Breakdown

5.1: SUBSTANTIAL REVISIONS

Before you begin your editing process with a bird's-eye view of the whole document, it might be a good idea to step away from it altogether. Distancing yourself from the work you just drafted helps you approach it again with fresh eyes. This requires effective time management so that you have a solid draft ready well ahead of a deadline. Leaving enough time to shift attention to other work projects or your personal life, however, helps you forget a little what you were doing with the document in question. After some time, return to the document pretending it was written by someone else and you are its target audience, the one you profiled in Step 1.2 of the writing process (see §2.2 above). Ask yourself: will that target reader understand what you've written in the order you've presented it? To complete their understanding of your topic, what do they need to see that isn't in your draft yet? What parts are redundant, confuse the reader, or otherwise get in the way of their understanding and can just be deleted?

Alienating yourself from your own work helps give you the critical distance necessary to be more ruthless towards it than you are at the drafting stage. You cling too personally to the words you come up with at the drafting stage, whereas you would be more critical of the same words if they were written by someone else. Creating that critical distance helps you:

1. Re-arrange the order that you originally plotted out at the outlining step (see §4.2 above) if need be
2. Recognize gaps that must be filled with yet more draft material
3. Chop out parts that don't contribute to the purpose you set out to achieve, difficult as it may be to delete words that you laboured into being

Before returning to the topic of trimming, however, let's consider what you're looking for when you evaluate your draft.

- 5.1.1: Evaluating Your Draft
- 5.1.2: Reorganizing Your Draft
- 5.1.3: Adding to Your Draft
- 5.1.4: Trimming Your Draft

5.1.1: Evaluating Your Draft

When considering how your draft meets the objectives you set out to achieve at the outset (see Step 1.1 of the

writing process in §2.1 above), use a few different lenses to assess that achievement. Each lens corresponds to a step in the drafting process, as shown in the table below.

Table 5.1.1: Evaluation Lenses and Corresponding Steps in the Drafting Process

Evaluate for	Corresponding Step in the Drafting Process
1. Content	Laying down content in the researching stage (Ch. 3)
2. Organization	Organizing that material (§4.1–§4.2)
3. Style	Stylizing it into effective sentences and paragraphs (§4.3, §4.4, §4.5)
4. Readability	Adding document design features (§4.6)

When reading with these lenses after taking a break from your work, approach it more critically as if you were the reader you’re catering to (§2.2), not as the words’ sentimental and protective parent.

When evaluating for content, consider what your audience needs to see for understanding the topic. Ask yourself if your coverage is thorough, or if you’ve left gaps that would confuse your target audience. Do any concepts need further explanation? Less? With constraints on the length and scope of your document in mind, consider if you got carried away with digressions that would send your reader down off-topic dead ends. Have you given your audience more than what they need so that your document would overwhelm them? More specifically, have you fact-checked all of your information to ensure that it is true and, if based on sources that must be documented, accurately cited and referenced?

When evaluating for organization, consider the flow of content to determine if the document leads the reader through to the intended understanding of the topic. Is it clear that you’re taking the direct approach (see §4.1.1 above) by getting right to the point when you need to do so, or is it obvious that you’re taking the indirect approach as necessary (§4.1.2)? Would it be clear to your reader what organizing principle you’ve followed (§4.1.3)? When you outlined your draft in Step 3.2 of the writing process (§4.2), you did so from a preliminary understanding of your topic. As you drafted your message, do you see that something you first thought made sense near the end of your draft makes more sense at the beginning?

When evaluating for style, again consider your audience’s needs, expectations, and abilities. Did you draft in an informal style but now realize that a slightly more formal style is more appropriate (§4.5.1) or vice versa? If you produced a 6 Cs style rubric for Exercise #1 at the end of §4.5.2 above, apply it now to your draft to determine if it meets audience expectations in terms of its clarity, conciseness, coherence, correctness, courtesy, and confidence. Now would also be a great time to assess whether your style is consistent or whether you started off formal but then lapsed into informality, or vice versa.

When evaluating for readability, consider your audience’s needs in terms of the many features that frame

and divide the text so that your reader doesn't get lost, confused, overwhelmed, repulsed, or bored. Check for whether you can do the following:

- Clarify titles
- Add headings or subheadings to break up large chunks of text
- Use lists to enable readers to skim over several items
- Add visuals to complement your written descriptions

The conclusions you draw from these evaluations will help inform and motivate you towards the substantial revisions explained below.

5.1.2: Reorganizing Your Draft

When you first move into a new apartment or house, you have a general idea of where all your furniture should go based on where it was in your previous place. After a few days, however, you may realize that the old arrangement doesn't make as much sense in the new layout. A new arrangement would be much more practical. The same is true of your document's organization once you've completed a working draft. You may realize that your original outline plan doesn't flow as well as you thought it would now that you've learned more about the topic in the process of writing on it.

Moving pieces around is as easy as highlighting, copying (Ctrl c), cutting (Ctrl x), and pasting (Ctrl v) into new positions. When moving a whole paragraph or more, however, ensure coherence (recall §4.4.2) by rewriting the transitional element in the concluding sentence of the paragraph above the relocated paragraph so that it properly bridges to the newly located topic sentence below it. Likewise, the relocated paragraph's (or paragraphs') concluding sentence must transition properly to the new topic sentence below it. Additionally, any elements within the relocated text that assume knowledge of what came just before, such as abbreviations (e.g., CBC) that the reader hasn't seen fully spelled out yet (see §5.4.1 below) must be fully spelled out here and can be abbreviated later in the text.

5.1.3: Adding to Your Draft

In furnishing your new apartment or house, especially if it's larger than what you had before, you'll find that merely transplanting your old furniture isn't enough. The new space now has gaps that need to be filled—a chair here, a couch there, perhaps a rug to tie the whole room together. Likewise, you'll find when writing a document that gaps need to be filled with more detail. Knowing your organizing principles well (recall §4.1.3 above) is helpful here. If you're explaining a procedure in a chronological sequence of steps, for instance, you may find that one of the steps you describe involves a whole other sequence of steps that you're sure

your audience won't know (based on your profile of them in Step 1.2; see §2.2). In this case, embedding the additional sequence using a sub-list numbered with roman numerals (if you used Arabic numerals in the main list) completes the explanation. Of course, keep in mind any stated maximum word- or page-counts in case your document exceeds the acceptable range. If it does, then you must be ruthless about chopping anything unnecessary out of your draft.

5.1.4: Trimming Your Draft



As #2 in the 6 Cs of good writing (see §4.5.2.2 above), conciseness means using the fewest words possible to achieve the goal of communication, which is for your reader to understand your intended meaning (see §1.3 above). Many college students who stretched out their words to reach 1000-word essays are relieved to find that college and professional audiences prefer writing that is as terse as a text. Indeed, because typing with thumbs is inefficient compared with 10 fingers on a keyboard and no one wants to read more than they must on a little screen, texting helps teach conciseness. Although professional writing requires a higher quality of writing than friends require of texts, the audience expectations are the same. The more succinct your writing is without compromising clarity, the more your reader will appreciate your writing. Given the choice between an article of 500 words and one of 250 that says the same thing, any reader would prefer the 250-word version. We all have better things to do in our jobs than read long-winded blather. Anything that doesn't contribute to the purpose of your message or document as you conceived it back in Step 1.1 of the writing process (§2.1) must go.

The first trick to paring down your writing is to really want to make every word count and to see excess words as grotesque indulgence. So, pretend that words are expensive. If you had to pay a cent of your own money for every character you wrote in a document that you had to print 1,000 copies of, you would surely adopt a frugal writing style. You would then see that adding unnecessary words is doubly wasteful because time is money. Time spent writing or reading tiresome pap is time you and your reader could spend making money doing other things. Terse, to-the-point writing is both easier to write and easier to read than insufferable rambling. After putting yourself in a frugal frame of mind that detests an excessively wordy style, follow the practical advice in the subsections below to trim your writing effectively.

1. Mass-delete Whatever Doesn't Belong

The first practical step towards trimming your document is a large-scale purge of whatever doesn't contribute to the purpose you set out to achieve. The order is important because you don't want to do any fine-tooth-comb proof-editing on anything that you're just going to delete anyway. This is probably the most difficult action to follow through on because it means deleting large swaths of writing that may have taken some time and effort to compose. You may even have enjoyed writing them because they're on quite interesting sub-topics. If they sidetrack readers, whose understanding of the topic would be unaffected (at best) or (worst) overwhelmed by their inclusion, those sentences, paragraphs, and even whole sections simply must go. Perhaps save them in an "outtakes" document if you think you can use them elsewhere. Otherwise, like those who declutter their apartment after reading Marie Kondo's *The Life-Changing Magic of Tidying Up* (2014), the release that follows such a purge can feel something like enlightenment. Highlight, delete, and don't look back.

2. Delete Long Lead-ins

The next-biggest savings come from deleting lead-ins that you wrote to gear up towards your main point. In ordinary speech, we use lead-ins as something like throat-clearing exercises. In writing, however, these are useless at best because they state the obvious. At worst, lead-ins immediately repulse the reader by signalling that the rest of the message will contain some time-wasting verbiage. If you see the following crossed-out expressions or anything like them in your writing, just delete them:

- *~~I'm Jerry Mulligan and I'm writing this email to ask you to please consider my application for a co-op position at your firm.~~*
- ~~You may be interested to know that~~ you can now find the updated form in the company shared drive.
- ~~To conclude this memo,~~ we recommend a cautious approach to using emojis when texting clients, and only after they've done so first themselves.

In the first example, the recipient sees the name of the sender before even opening their email. It's therefore redundant for the sender to introduce themselves by name and say that they wrote this email. Likewise, in the third example, the reader can see that this is the conclusion if it's the last paragraph, especially if it comes below the heading "Conclusion." In each case, the sentence really begins after these lead-in expressions, and the reader misses nothing in their absence. Delete them.

3. Pare Down Unnecessarily Wordy Phrases

We habitually sprinkle long stock phrases into everyday speech because they sound fancy merely because

they're long and sometimes old-fashioned, as if length and long-time use grants respectability (it doesn't). These phrases look ridiculously cumbersome when seen next to their more concise equivalent words and phrases, as you can see in Table 5.1.4.3 below. Unless you have good reason to do otherwise, always replace the former with the latter in your writing.

Table 5.1.4.3: Replace Unnecessarily Wordy Phrases with 1-2 Word Equivalents

Replace These Wordy Phrases	with These Concise Equivalents
at this present moment in time	now
in any way, shape, or form	in any way
pursuant to your request	as requested
thanking you in advance	thank you
in addition to the above	also
in spite of the fact that	even though / although
in view of the fact that	because / since
are of the opinion that	believe that / think that
afford an opportunity	allow
despite the fact that	though
during the time that	while
due to the fact that	because / since
at a later date/time	later
until such time as	until
in the near future	soon
fully cognizant of	aware of
in the event that	if
for the period of	for
attached hereto	attached
each and every	all
in as much as	because / since
more or less	about
feel free to	please

Again, the reader misses nothing if you use the words and phrases in the second column above instead of those in the first. Also, concise writing is more accessible to readers who are learning English as an additional language.

4. Delete Redundant Words

Like the wordy expressions in Table 5.1.4.3 above, our speech is also riddled with redundant words tacked on unnecessarily in stock expressions. These prefabricated phrases strung mindlessly together aren't so bad when spoken because talk is cheap. In writing, however, which should be considered expensive, they make the author look like an irresponsible heavy spender. Be on the lookout for the expressions below so that you are in command of your language. Simply delete the crossed-out words in red if they appear in combination with those in blue:

- ~~absolutely~~ essential (*you can't get any more essential than essential*)
- ~~future~~ plans (*are you going to make plans about the past? plans are always future*)
- small ~~in size~~ (*the context will determine that you mean small in size, quantity, etc.*)
- refer ~~back~~ to
- ~~in order~~ to (*only use "in order" if it helps distinguish an infinitive phrase, which begins with "to," from the preposition "to" appearing close to it*)
- each ~~and every~~ or ~~each and~~ every (*or just "all," as we saw in Table 5.1.4.3 above*)
- repeat ~~again~~ (*is this déjà vu?*)

5. Delete Filler Expressions and Words

If you audio-record your conversations and make a transcript of just the words themselves, you'll find an abundance of filler words and expressions that you could do without and your sentences would still mean the same thing. A few common ones that appear at the beginning of sentences are "There is," "There are," and "It is," which must be followed by a relative clause starting with the relative pronoun that or who. Consider the following, for example:

1. There are many who want to take your place.	Many want to take your place.
2. There is nothing you can do about it.	You can do nothing about it.
3. It is the software that keeps making the error.	The software keeps erring.

In the first and third cases, you can simply delete "There are" and "It is," as well as the relative pronouns "who" and "that" respectively, leaving the sentence perfectly fine without them. In the second case, deleting "There is"

requires slightly reorganizing the word order, but otherwise requires no additional words to say the very same thing. In each case, you save two or three words that simply don't need to be there.

Other common filler words include the articles *a*, *an*, and *the*, especially in combination with the preposition *of*. You can eliminate many instances of *of the* simply by deleting them and flipping the order of the nouns on either side of them.

technology of the future

future technology

Obviously, you can't do this in all cases (e.g., changing "first of the month" to "month first" makes no sense). When proofreading, however, just be on the lookout for instances where you *can*.

The definite article the preceding plural nouns is also an easy target. Try deleting the article to see if the sentence still makes sense without it.

The shareholders unanimously supported the initiative.

Shareholders unanimously supported the initiative.

Though the above excess words seem insignificant on their own, they bulk up the total word count unnecessarily when used in combination throughout a large document. They are like dog food fillers such as "powdered cellulose" (a.k.a. sawdust). They provide no nutritive value, but manufacturers add them to charge you more for the mere volume they add to the product. Please don't cut your writing with filler.

6. Delete Needless Adverbs

Streamline your writing by purging the filler adverbs that you pepper your conversational speech with. In writing, these add little meaning. Recall that adverbs are words that explain verbs (like adjectives do nouns) and typically, but not always, end in *-ly*. Some of the most common intensifying adverbs include the following:

- actually
- basically
- completely
- definitely
- extremely
- fairly
- fully
- greatly
- hugely
- literally
- quite

- rather
- really
- somewhat
- terribly
- totally
- very
- wholly

Perhaps the worst offender in recent years has been *literally*, which people overuse and often misuse when they mean “figuratively” or even “extremely,” especially when exaggerating. Saying, “I’ve literally told you a million times not to exaggerate” misuses *literally* (albeit ironically in this case) because telling someone not to exaggerate a million times would literally take about 20 days if you did nothing but repeat the phrase constantly all day every day without sleeping. That’s not going to happen. If you say, “I’m literally crazy for your speaking style,” you just mean “I’m thrilled by your speaking style.” Using “literally” in this case is just babbling nonsense.

If you find yourself slipping in any of the above adverbs in your writing, question whether they need to be there. (In the case of the previous sentence, leaving out “really” before “need” doesn’t diminish the impact of the statement much.) Consider the following sentence:

~~Basically~~, you can’t ~~really~~ do much to ~~fully~~ eliminate bad ideas because they’re ~~quite~~ common.

You can’t do much to eliminate bad ideas because they’re so common.

7. Favour Short, Plain Words and Use Jargon Selectively

If you pretend that every character in each word you write costs money from your own pocket, you would do what readers prefer: use shorter words. The beauty of plain words is that they are more understandable and draw less attention to themselves than big, fancy words while still getting the point across. This is especially true when your audience includes ESL readers. Choosing shorter words is easy because they are often the first that come to mind, so writing in plain language saves you time in having to look up and use bigger words unnecessarily. It also involves vigilance in opting for shorter words if longer jargon words come to mind first.

Obviously, you would use **jargon** for precision when appropriate for your audience’s needs and your own. You would use the word “photosynthesis,” for instance, if (1) you needed to refer to the process by which plants convert solar energy into sugars and (2) you know your audience knows what the word means. In this case, using the big, fancy jargon word achieves a net savings in the number of characters because it’s the most precise term for a process that otherwise needs several words. Using jargon words merely to extend the number of characters, however, is a desperate-looking move that your instructors and professional audiences will see through as a time-wasting smokescreen for a lack of quality ideas.

Table 5.1.4.7 below lists several polysyllabic words (those having more than one syllable) that writers often use when a shorter, more plain and familiar word will do just as well. There's a time and place for fancier words, such as when formality is required, but in routine writing situations where there's no need for them, always opt for the simple, one- or two-syllable word.

Table 5.1.4.7: Favour Plain, Simple Words over Polysyllabic Words

Big, Fancy Words	Short, Plain Options
advantageous	helpful
ameliorate	improve
cognizant	aware
commence	begin, start
consolidate	combine
deleterious	harmful
demonstrate	show
disseminate	issue, send
endeavour	try
erroneous	wrong
expeditious	fast
facilitate	ease, help
implement	carry out
inception	start
leverage	use
optimize	perfect
proficiencies	skills
proximity	near
regarding	about
subsequent	later
utilize	use

Source: Brockway (2015)

The longer words in the above table tend to come from the Greek and Latin side of the English language's parentage, whereas the shorter words come from the Anglo-Saxon (Germanic) side. When toddlers begin

speaking English, they use Anglo-Saxon-derived words because they're easier to master, and therefore recognize them as plain, simple words throughout their adult lives.

Definitely don't use longer words when they're grammatically incorrect. For instance, using **reflexive pronouns** such as "myself" just because it sounds fancy instead looks foolish when the subject pronoun "I" or object pronoun "me" are correct.

<i>Aaron and myself will do the heavy lifting on this project.</i>	Aaron and I will do the heavy lifting on this project.
<i>I'm grateful that you contacted myself for this opportunity.</i>	I'm grateful that you contacted me for this opportunity.

The same goes for misusing the other reflexive pronouns "yourself" instead of "you," "himself" or "herself" instead of "him" or "her," etc. See Table 4.4.2a above for more on correct uses of pronouns.

Sometimes, you see short words rarely used in conversation being used in writing to appear fancy, but just look pretentious, such as "said" preceding a noun.

<i>Call me if you are confused by anything in the said contract.</i>	Call me if you are confused by anything in the contract.
---	--

Usually, the context helps determine that the noun following "said" is the one mentioned earlier, making "said" an unnecessary, pompous add-on. Delete it or use the demonstrative pronouns "this" or "that" if necessary to avoid confusion.

Finally, don't fall into the trap of thinking that a simple style is the same as being simplistic. Good writing can communicate complex ideas in simple words just like bad writing can communicate simple ideas with overly complex words. The job of the writer in professional situations is to make smart things sound simple. Be wary of writing that makes simple things sound complex. You probably don't want what it's selling.

8. Simplify Verbs

Yet another way that people overcomplicate their writing involves expressing the action in as many words as possible, such as by using the passive voice (see §4.3.4 above), continuous tenses, and nominalizations. We've already seen how the **passive voice** rearranges the standard subject-verb-object word order so that, by going object-verb-subject, an auxiliary verb (form of the verb *to be*) and the preposition *by* must be added to say what an active voice sentence says without them. Consider the following sentences, for instance:

<i>The candidate cannot be supported by our membership.</i>	Our members cannot support the candidate.
--	--

Here, the active-voice construction on the right uses two fewer words to say the same thing. Though we saw in §4.3.4 that there certainly are legitimate uses of the passive voice, overusing the passive voice sounds unnatural

and appears as an attempt to extend the word count or sound more fancy and objective. Because the passive voice is either more wordy or vague than the active voice, however, readers prefer the latter most of the time and so should you.

Another common annoyance to busy readers is using **continuous verb forms** instead of simple ones. The continuous verb form uses the participle form of the main verb, which means adding an -ing ending to it, and adds an auxiliary verb (form of the verb *to be*, which differs according to the person and number) to determine the tense (past, past perfect, present, future, future perfect, etc.). In the table below, you can see how cumbersome continuous forms are compared with simple ones.

Table 5.1.4.8: Favour Simple Verb Forms Instead of Continuous Forms

Continuous Verb Forms	Simple Verb Forms
I was writing a letter to her.	I wrote a letter to her.
I had been writing a letter to her.	I had written a letter to her.
I have been writing a letter to her.	I have written a letter to her.
I would have been writing a letter to her.	I would have written a letter to her.
I am writing a letter to her.	I write a letter to her.
I would be writing a letter to her.	I would write a letter to her.
I will be writing a letter to her.	I will write a letter to her.
I will have been writing a letter to her.	I will have written a letter to her.

There are certainly legitimate reasons for using continuous verb forms to describe actions stretching out over time. In the case of the present tense, saying, “I am considering my options” is more appropriate compared with “I consider my options” because you really are in the process of considering your options. In other tenses, however, people who use wordcount-extending strategies favour continuous verb forms because they think those forms sounds fancier. Overused or misused, however, such verb forms just annoy the reader by overcomplicating the language.

Yet another strategy for extending the wordcount with verbs is to turn the main action they describe into nouns, a process called **nominalization**. This involves taking a verb and adding a suffix such as *-ant*, *-ent*, *-ion*, *-tion*, *-sion*, *-ence*, *-ance*, or *-ing*, as well as adding forms of other verbs, such as *to make* or *to give*. Nominalization may also require determiners such as articles (*the*, *a*, or *an*) before the action nouns. Consider the following comparisons of nominalized-verb sentences with simplified verb forms:

The committee **had a discussion** about the new budget constraints.

We **will make a recommendation** to proceed with the investment option.

They **handed down a judgment** that the offer wasn't worth their time.

The regulator will **grant approval of** the new process within the week.

He always **gives me advice** on what to say to the media.

She's **giving** your application **a pass** because of all the errors in it.

The committee **discussed** the new budget constraints.

We will **recommend** proceeding with the investment option.

They **judged** that the offer wasn't worth their time.

The regulator will **approve** the new process within the week.

He always **advises** me on what to say to the media.

She's **passing** on your application because of all the errors in it.

You can tell that the above sentences where the simple verb drives the action are punchier and have greater impact than those that turn the action into a noun and thus require more words to say the same thing. Indeed, each of the verb-complicating, wordcount-extending strategies throughout this subsection is bad enough on its own. In combination, however, writing riddled with nominalization, continuous verb forms, and passive-voice verb constructions muddies writing with an insufferable multitude of unnecessary words.

The final trick to making your writing more concise is the Editor feature in your word processor. In Microsoft Word, for instance, you can set up the Spelling & Grammar checker to scan for all the problems above by following the procedure below:

The committee **had a discussion** about the new budget constraints.

We **will make a recommendation** to proceed with the investment option.

They **handed down a judgment** that the offer wasn't worth their time.

The regulator will **grant approval of** the new process within the week.

He always **gives me advice** on what to say to the media.

She's **giving** your application **a pass** because of all the errors in it.

The committee **discussed** the new budget constraints.

We **will recommend** proceeding with the investment option.

They **judged** that the offer wasn't worth their time.

The regulator will **approve** the new process within the week.

He always **advises** me on what to say to the media.

She's **passing** on your application because of all the errors in it.

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The final trick to making your writing more concise is the Editor feature in your word processor. In Microsoft Word, for instance, you can set up the Spelling & Grammar checker to scan for all the problems above by following the procedure below:

1. Go to File (alt. + f) and, in the **File** menu, click on **Options** (at the bottom; alt. + t) to open the Word Options control panel.
2. Click on **Proofing** in the Word Options control panel.
3. Check all the boxes in the “When correcting spelling and grammar in Word” section of the Word Options control panel.
4. Click on the **Settings...** button beside “Writing Style” under the check boxes to open the Grammar Settings control panel.
5. Click on all the check boxes in the Grammar Settings control panel, as well as the Okay button of both this panel and the Word Options panel to activate.

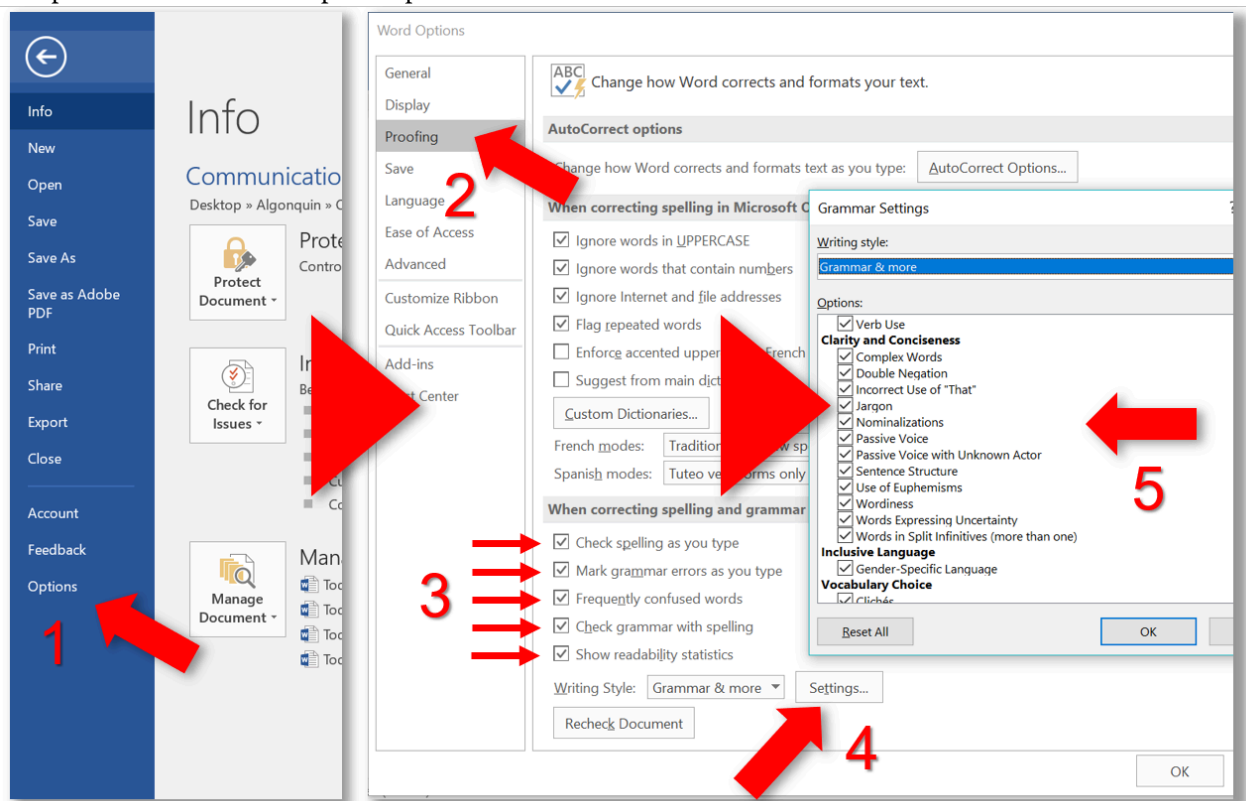


Figure 5.1.4.8: Setting up your MS Word Grammar, Style, and Spellchecker

6. Go to the **Review** menu tab in the tool ribbon at the top of the Word screen and select Spelling & Grammar (alt. + r, s) to activate the Editor that will, besides checking for spelling and grammar errors, also check for all of the stylistic errors you checked boxes for in the Grammar Settings control panel.

When you finish running your grammar, style, and spellchecker through your document, a dialog box will appear showing readability statistics. Pay close attention to stats such as the average number of words per

sentence and letters per word. If the former exceeds thirty and the latter ten, your writing might pose significant challenges to some readers, especially ESL. Do them a solid favour by breaking up your sentences and simplifying your word choices.

Rather than suck the life out of language by adding useless verbiage, make your writing like a paperclip. A paperclip is beautiful in its elegance. It's so simple in its construction and yet does its job of holding paper together perfectly without any extra parts or mechanisms like staples need to fasten pages together and unfasten them. A paperclip does it with just a couple inches of thin, machine-bent wire. We should all aspire to make our language as elegant as a paperclip so that we can live life free of time-wasting writing.

Key Takeaways



Begin editing any document by evaluating it for the quality of its content, organization, style, and readability, then add to it, reorganize, and trim it as necessary to meet the needs of the target audience.

Exercises



1. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago so that it almost seems like it was written by another person. Evaluate and comment on its content, organization, style, and readability. Explain how you can improve it from each of these perspectives (see §5.1.1 above).
2. Add to that assignment anything that would help the target audience understand it better (see §5.1.3 above).
3. Trim that assignment using the eight strategies explained in §5.1.4 above.

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5.2: PROOFREADING FOR GRAMMAR

Learning Objectives



1. Identify and correct sentence errors such as comma splices, run-ons, and fragments.
2. Identify and correct grammatical errors such as subject-verb and pronoun-antecedent disagreement, as well as faulty parallelism.
3. Identify and correct syntax errors such as misplaced modifiers.
4. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Grammar organizes the relationships between words in a sentence, especially between the doer and action, so that the reader can understand in detail who's doing what. When you botch those connections with grammar errors, however, you risk confusing the reader. Severe errors force the reader to interpret what you meant. If the reader then acts on an interpretation different from the meaning you intended, major consequences can ensue, including expensive damage control. You can avoid being a liability and embarrassing yourself by following some simple rules for how to structure your sentences grammatically. By following these rules habitually, especially when you apply them at the proofreading stage, not only will your writing be clearer to the reader and better organized, but your thought process may become more organized as well.

- 5.2.1: Sentence Errors
- 5.2.2: Grammar Errors

5.2.1: Sentence Errors

Readers who find comma splices, fragments, and run-on sentences lose confidence in the writer's command of language and thus the quality of their work. Such giveaways suggest that the writer doesn't know much about sentence structure and punctuation. This is especially bad coming from native English speakers in their 20s or

older because it says that they still don't understand the basics of their own written language even after decades of using it. It's important to know what to look for, then, when proofreading your draft for sentence errors.

- 5.2.1.1: Comma Splices
- 5.2.1.2: Run-on Sentences
- 5.2.1.3: Sentence Fragments

1. Comma Splices

A comma splice is simply two independent clauses separated by only a comma. Perhaps the error comes from writers thinking that, because the two clauses say closely related things, they need something a little “lighter” than a period to separate them. While separating them with a comma is certainly possible, doing so with a comma alone shows that the writer doesn't fully understand what a sentence is and what commas do.

The sale begins on Saturday, let's get there right at 9am.

 comma splice

Figure 5.2.1.1: A comma splice is a comma separating two independent clauses

Spotting a comma splice requires being able to identify an independent clause—i.e. the combination of a subject and predicate (noun + verb) that can stand on its own as a sentence (see §4.3.1 and §4.3.2 above). In the Figure 5.2.1.1 example above, the first independent clause's subject is “The sale” and its predicate is “begins on Saturday” (sale + begins), so it can stand on its own as a sentence if it ended with a period. The second is an imperative clause (see Table 4.3.1 for more on imperatives) with the main verb being “let,” so it too can stand on its own as a sentence. When proofreading, be on the lookout for commas that have independent clauses on either side—that is, clauses that can stand on their own as sentences.

Fixing a comma splice is as easy as swapping out the comma for the correct punctuation or adding a conjunction, depending on the relationship you want to express between the two clauses. Altogether, you have four options in correcting a comma splice—two that replace the comma with other punctuation and two that leave it as-is but add a conjunction:

- Replace the comma with a **period** to turn the two independent clauses into two sentences if each is a distinct enough complete thought. Don't forget to capitalize the letter that followed the comma.

Correcting the comma splice in the Figure 5.2.1.1 example would look as follows:

The sale begins on Saturday. Let's get there at 9am.

- Replace the comma with a **semicolon** to form a compound sentence if the two independent clauses are related enough to be in the same sentence:

The sale begins on Saturday; let's get there at 9am.

If the writer wanted something a little lighter than a period to separate the two clauses, then a semicolon fits the bill.

- Add a **coordinating conjunction** (e.g., and, but, so; see Table 4.3.2a for all seven of them) to form a compound sentence if it clarifies the relationship between the independent clauses:

*The sale begins on Saturday, **so** let's get there at 9am.*

Note that if you see three or more independent clauses with commas between them and an and or or before the last one, then it's a perfectly correct (albeit probably too long) compound sentence that combines whole clauses rather than just nouns or verbs. See the final example given in Comma Rule 4 below for a sentence organized into a list of clauses.

- Add a **subordinating conjunction** (e.g., when, if, though, etc.; see Table 4.3.2a for more) to form a complex sentence (see Table 4.3.2b for more on complex sentences):

***When** the sale begins on Saturday, let's get there at 9am.*

Though each of the above comma-splice fixes is grammatically correct, the last two are best because adding a conjunction clarifies the relationship between the ideas expressed in the two clauses.

A common comma splice error involves “however” following a comma that separates two independent clauses. Consider the following sentence that are grammatically equivalent:

*The company raised its rates, **however**, we were granted an exemption.*

*= The company raised its rates, **however** we were granted an exemption.*

= The company raised its rates, we were granted an exemption.

Seeing that you have independent clauses on either side of the comma preceding “however” is easier if you imagine the sentence without both “however” and the comma following it, as in the third example sentence above. Fixing the error is as easy as replacing the comma preceding “however” with a semicolon and ensuring that a comma follows “however,” which is a conjunctive adverb (see Comma Rule 2 below):

*The company raised its rates; **however**, we were granted an exemption.*

This is somewhat tricky because “however” can be surrounded by commas if it's used as an interjection between the subject and predicate (see Comma Rule 3 below) or between clauses in a complex sentence:

*This particular company, **however**, had been delaying raising its rates for years.*

*With the company raising its rates, **however**, we had to apply for an exemption.*

Because you see the first clause beginning with “With” in the second example, you know that it's a dependent clause that will end with a comma followed by the main clause. It's thus possible to add “however” where the comma separates the subordinate from the main clause.

When proofreading, be on the lookout for “however” surrounded by commas. If the clauses on either side

can stand on their own as sentences, fix the comma splice easily by replacing the first comma with a semicolon. If one of the clauses before or after is a subordinate clause and the other a main clause, however, then you're safe (as in this sentence). For more on comma splices, see the following resources:

- Run-On Sentences and Comma Splices and the Repairing Run-On Sentences exercises (Darling, 2014a)
- Comma Splices (Wells & Brizee, 2009)
- Fixing Comma Splices (Plotnick, 2003)

2. Run-on Sentences

Whereas a comma splice places the wrong punctuation between independent clauses, a run-on (a.k.a. fused) sentence simply omits punctuation between them. Perhaps this comes from the second clause following the first so closely in the writer's free-flowing stream of consciousness that they don't think any punctuation is necessary between them. While it may be clear to the writer where one idea-clause ends and the other begins, that division isn't so clear to the reader. The absence of punctuation will cause them to trip up, and they're forced to mentally insert the proper punctuation to make sense of it, which is frustrating.

Spotting a run-on is easy if it's just commas missing before coordinating conjunctions. If you string together the last couple of sentences concluding the above paragraph, for instance, and use conjunctions to separate the four clauses without accompanying commas, you'll get a cumbersome run-on:

*That division isn't so clear to the reader **and** the absence of punctuation will cause them to trip up **and** they're forced to mentally insert the proper punctuation to make sense of it **and** that's frustrating.*

"Run-on" is a good description for sentences like this because they seem like they can just go on forever like a toddler tacking on clause after clause using coordinating conjunctions (... and ... and ... and ...). Though the above sentence would be perfectly correct if commas preceded "and" and "so," adding further clauses would just exhaust the reader's patience, commas or no commas. A run-on is not necessarily the same as a long sentence, then, as you can see with the perfectly correct 239-word sentence in Algonquin College's *Guide to Grammar and Writing* page on run-ons (Darling, 2014). Such a long sentence can become convoluted, however, especially for audiences who may struggle with English such as ESL learners.

Sometimes spotting a run-on is just a matter of tripping over its nonsense. Say you're reading your draft and then come across the following sentence:

We'll have to drive the station is too far away to get there on foot.

You're doing just fine reading this sentence up until the word "is" since, the way things were going, you probably expected a vehicle to follow the article "the." Assuming "drive" is being used as a transitive verb (Simmons, 2007) that takes an object, "station wagon" would make sense. When you see "is" instead of "wagon," however, you might go back and see if the writer forgot to put "to" before "station" to make "drive to the station." That doesn't make sense either, however, given what follows. Finally, you realize that you're really

dealing with two distinct independent clauses starting with a short one, and that some punctuation is missing after “drive.” The sentence is like a chain with a broken link.

Once you’ve found that missing link, fixing a run-on is just a simple matter of adding the correct punctuation and perhaps a conjunction, depending on the relationship between the clauses. Indeed, the options for fixing a run-on are identical to those for fixing a comma splice. Following the same menu of options as those presented above, you would be correct doing any of the following:

- Add a **period** between the clauses (after “drive”) and capitalize “the” to form two sentences:

We’ll have to drive. The station is too far away to get there on foot.

- Add a **semicolon** between the clauses to form a compound sentence:

We’ll have to drive; the station is too far away to get there on foot.

This is the easiest, quickest fix of them all.

- Add a comma and **coordinating conjunction** to form a compound sentence:

We’ll have to drive, for the station is too far away to get there on foot.

- Add a **subordinating conjunction** to form a complex sentence:

We’ll have to drive because the station is too far away to get there on foot.

Again, though each of the above run-on fixes is grammatically correct, only the last one best clarifies the relationship between the ideas expressed in the two clauses. For more on run-on sentences, see the following resources:

- Run-On Sentences and Comma Splices (Darling, 2014a)
- Fragments and Run-Ons (Wells & Brizee, 2013)
- Grammar: Run-On Sentences and Sentence Fragments (Walden University, 2016)

3. Sentence Fragments

A sentence fragment is one that’s incomplete usually because either the main-clause subject, predicate, or both are missing. The most common sentence fragment is the latter, where a subordinate clause poses as a sentence on its own, usually with its main clause being the preceding or following sentence. If the final example in §5.2.1.2 above were a fragment, it would look like the following:

*We'll have to drive. **Because** the station is too far away to get there on foot.*

Recall from §4.3.2 that a complex sentence combines a main (a.k.a. independent) clause with a subordinate (a.k.a. dependent) clause, and the cue for the latter is that it begins with a subordinating conjunction (see Table 4.3.2a for several examples). In the above case, the coordinating conjunction “because” makes the clause subordinate, which must join with a main clause in the same sentence to be complete.

The fix is simply to join the fragment subordinate clause with its main clause nearby so that they're in the same sentence. You can do this in one of two ways, either of which is perfectly correct:

- Delete the period between the sentences and make the subordinating conjunction lowercase if the subordinate clause follows the main clause:

*We'll have to drive **because** the station is too far away to get there on foot.*

- Move the subordinate clause so that it precedes the main clause, separate the two with a comma, and make the first letter of the main clause lowercase:

***Because** the station is too far away to get there on foot, **we'll** have to drive.*

The same applies to sentences that begin with any of the seven coordinating conjunctions. These are technically fragments but can be easily fixed either by joining them with the previous sentence to make a compound. You could also change the conjunction to something else such as a conjunctive adverb like “However” for “but” or “Also” for “and” followed by a comma:

*The station is too far away to get there on foot. **But** we'll drive.*

*The station is too far away to get there on foot, **but** we'll drive.*

*The station is too far away to get there on foot. **However**, we'll drive.*

You may also encounter fragments that are just noun phrases, verb phrases, prepositional phrases, and so on. Of course, we speak often in fragments rather than full sentences, so if we're writing informally, such fragments are perfectly acceptable. Even in some formal documents, such as résumés, fragments are expected in certain locations such as the Objective statement (an infinitive phrase) and profile paragraph (noun phrases) in the Qualifications Summary (see §8.2 below).

If we're writing formally, however, these fragmentary phrases are variations on the error of leaving sentences incomplete. The easy fix is always to re-unite them with a proper sentence or to make them into one by adding parts.

*We thank you for choosing our company. **As well as** the impressive initiative you've taken.*

*We thank you for choosing our company **and** are impressed by the initiative you've taken.
We thank you for choosing our company. **You've shown** impressive initiative.*

The beauty of the English language is that there's an endless number of ways to say something and still be grammatically correct as long as you know what makes a proper sentence. If you don't, reviewing §4.3.1 and §4.3.2 above till you can spot the main subject noun and verb in any sentence, as well as tell if they're missing. For more on fragments, see the following resources:

- Sentence Fragments (Darling, 2014b)
- Fragments and Run-Ons (Wells & Brizee, 2013)
- Grammar: Run-On Sentences and Sentence Fragments (Walden University, 2016)

For exercises in spotting and fixing comma splices, run-ons, and fragments, see the digital activities at the bottom of the Guide to Grammar and Writing pages linked above (Darling, 2014a & 2014b), as well as Exercise: Run-ons, Comma Splices, and Fused Sentences (Purdue OWL, 2009).

5.2.2: Grammar Errors

Let's focus on some of the most common grammar errors in college and professional writing:

- 5.2.2.1: Subject-verb disagreement
- 5.2.2.2: Pronoun-antecedent disagreement
- 5.2.2.3: Faulty parallelism
- 5.2.2.4: Dangling and Misplaced Modifiers

1. Subject-verb Disagreement

Perhaps the most common grammatical error is subject-verb disagreement, which is when you pair a singular subject noun with a plural verb (usually ending without an s) instead of a singular one (usually ending with an s), or vice versa. Spotting such **disagreements of number** requires being able to identify the subject noun and main verb of every sentence and hence knowledge of sentence structure (see §4.3.1 and §4.3.2 above). The search for the main subject noun and verb is complicated by the fact that many other nouns and verbs in various phrase types can crowd into a sentence. The following subject-verb agreement (abbreviated "Subj-v Agr.") rules help you know what to look for.

Quick Rules

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common subject-verb disagreement errors associated with each one.

Subj-v Agr Rule 1.1:

Singular subjects take singular verbs.

*The **first** of many cuts **is** going to be the deepest.*

Subj-v Agr Rule 1.2:

The indefinite pronouns *each*, *either*, *neither*, and those ending with *-body* or *-one* take a singular verb.

*If **each** of you **chooses** wisely, **someone** **is** going to win the prize, but **everybody** **wins** because **neither** really **loses**.*

Subj-v Agr Rule 1.3:

Collective nouns and some irregular nouns with plural endings are singular and take a singular verb.

*The **band** **isn't** going on stage until the **news** about the stage lighting **is** more positive.*

Subj-v Agr Rule 2:

Plural noun, compound noun, and plural indefinite pronoun subjects take plural verbs.

*The **rights** of the majority usually **trump** those of minority groups, except when money **and** politics **conspire**, and **both** usually **do**.*

Subj-v Agr Rule 3:

Compound subjects joined by *or* or *nor* take verbs that agree in number with the nouns closest to them.

*Neither your **lawyers** **nor** the justice **system** **is** going to be able to adequately punish this type of crime.*

Subj-v Agr Rule 4:

The verb in clauses beginning with *there* or *here* agrees with the subject noun following the verb.

***There are** two **types** of people in the world, and **here comes** one of them now.*

Extended Explanations

Subj-v Agr. Rule 1.1: Singular subjects take singular verbs.

When the subject of the sentence—the doer of the action—is a singular subject (i.e. one doer), the verb (the action it performs) is always singular. Watch out, though: this rule holds even if phrases modifying the subject or intervening parenthetical elements are plural. You just have to be able to tell that those phrases and parenthetical elements aren't the main subject and therefore don't count when determining the number of the verb.

Correct:

*Our **investment** **is** paying off nicely.*

Why it's correct: The singular subject “investment” takes the singular verb “is,” which is the third-person singular form of the verb to be.

Correct:

*The **source** of all our network errors **disappears** whenever you do a system restart.*

Why it's correct: The singular subject “source” takes the singular main verb “disappears”; the plural noun “errors” immediately before the verb is just the last word in a prepositional phrase (“of . . .”) modifying the subject.

Correct:

***Stalling** for time to think of better responses **doesn't** work in a job interview.*

Why it's correct: The singular subject “stalling,” a gerund (action noun) takes the singular main verb “does”; the plural noun “responses” immediately before the verb is just the last word in a prepositional phrase (“of . . .”) embedded in an infinitive phrase (“to think . . .”) embedded in another prepositional phrase (“for . . .”).

Correct:

*The **singer-songwriter**, along with new additions to her five-piece backup band, **arrives** at the press conference at 1:30pm.*

Why it's correct: Despite the parenthetical addition of other actors, the grammatical subject (“singer-songwriter”) is still singular and takes a singular verb.

How This Helps the Reader

Following this rule helps the reader connect the doer of the action with main action itself, especially when a variety of phrases, including nouns of different number, intervene between the subject noun and main verb.

What to Look for When Proofreading

Look for subject nouns (the main doers of the action) and the main verbs that the subject noun takes, then ensure that both are singular. Look out especially for verbs that are wrongly plural in form because the nouns

immediately preceding them are plural despite the fact that they are only part of phrases modifying the main subject noun.

Incorrect:

*The best **vodka** in the opinion of all the experts at international competitions **are** surprisingly the bottom-shelf Alberta Pure.*

The fix:

*The best **vodka** in the opinion of all the experts at international competitions **is** surprisingly the bottom-shelf Alberta Pure.*

Incorrect:

*The lucky **winner**, as well as three of their best friends, **are** going on an all-expenses-paid trip to beautiful Cornwall, Ontario!*

The fix:

*The lucky **winner**, as well as three of their best friends, **is** going on an all-expenses-paid trip to beautiful Cornwall, Ontario!*

In the first incorrect example sentence above, the proximity of the plural nouns “experts” and “competitions” to the main verb (form of *to be*) probably made the writer think that the verb had to be plural, too. The true subject noun of the sentence, however, is “vodka,” which is singular and therefore takes the singular verb “is” no matter what comes between them. In the second incorrect sentence, the grammatical subject is the singular “winner,” so the main verb should be the singular “is,” not the plural “are.” A parenthetical interjection between the subject and the verb, even if it appears to pluralize the subject with “as well as,” “along with,” “plus,” or the like, technically doesn’t make a compound subject (see Subj-v Agr. Rule 2 below for more on compounds).

Subj-v Agr. Rule 1.2: The indefinite pronouns *each*, *either*, *neither*, and those ending with *-body* or *-one* take a singular verb.

When the subject noun of the sentence is the indefinite pronoun *either*, *neither*, *each*, *anybody*, *everybody*, *nobody*, *somebody*, *anyone*, *everyone*, *someone*, *no one*, or *none* (see Table 4.4.2a above on pronouns), it is singular and takes a singular verb.

Correct:

Each has enough personal finance know-how to handle her own taxes.

Why it's correct: The subject pronoun “Each” can be thought of the singular “Each one” and therefore takes a singular verb. In this case the verb is “has” rather than the plural “have” that would be appropriate if the subject were “All of them.”

Correct:

Either is fine.

Why it's correct: The subject pronoun “Either” can be thought of the singular “Either one,” despite implying a pair of options, and therefore takes a singular verb—in this case “is.”

Correct:

“Perhaps none is more vulnerable than James, a soft-spoken 19-year-old who is quick to flash a smile that would melt ice” (Chianello, 2014, ¶24).

Why it's correct: The subject pronoun “none” in this case can be thought of the singular “no one” because the topic of the sentence concerns a single person. The pronoun therefore takes a singular verb—in this case “is” rather than the plural “are.”

Exception: *None* can sometimes be a plural indefinite pronoun depending on what comes later in the sentence.

Correct:

“None are more hopelessly enslaved than those who falsely believe they are free” (Goethe, 1809, p. 397).

Why it's correct: The subject pronoun “none” can be thought of as “no people,” consistent in number with the later pronoun “those,” and thus a plural pronoun that takes a plural verb—in this case “are,” not “is.”

How This Helps the Reader

Following this rule helps the reader see that the “one” or “body” suffix in each of these indefinite pronouns is singular, even if the word applies to many people, and therefore takes a singular verb form.

What to Look for When Proofreading

Look for any indefinite pronouns ending with *-one* or *-body* taking a plural main verb and change the verb to the singular form.

Incorrect:

*Everybody here **share** our opinion on quantitative easing.*

The fix: *Everybody here **shares** our opinion on quantitative easing.*

The fix: *All here **share** our opinion on quantitative easing.*

Incorrect:

*Each of you **send** enough carbon into the atmosphere to poison a river.*

The fix: *Each of you **sends** enough carbon into the atmosphere to poison a river.*

The fix: *All of you **send** enough carbon into the atmosphere to poison a river.*

Here, the “every” part of the word *everybody* in the first incorrect sentence and the fact that the second address a group suggest to the confused writer that a plurality of actors is at play, thus requiring the plural verbs “share” and “send.” Wrong! The “body” part of the word is the operative one; being singular, it takes a singular verb—“shares” in this case—and “Each” is short for “Each one.” Another fix in each case is to make the subject the plural “All” and keep the verbs plural.

Subj-v Agr. Rule 1.3: Collective nouns and some irregular nouns with plural endings are singular and take a singular verb.

Collective nouns such as “group” are grammatically singular and thus take a singular verb despite meaning several people or things. The following are common collective nouns:

army	department	party
audience	faculty	plethora
band	family	public
board	firm	office
bundle	gang	school
cabinet	group	senate
class	jury	society
committee	majority	task force
company	membership	team
corporation	minority	tribe
council	navy	troupe
crew	pack	

The same is true of any company name that ends in s or has a compound name (e.g. Food Basics, Long & McQuade), as well as any compound of inanimate objects treated as a singular entity (e.g., meat and potatoes is considered one dish; see Subj-v Agr. Rule 2 below for more on compounds). Likewise, some special-case words that look like plurals because they end with s instead take singular pronouns and verbs, especially names for games and disciplines or areas of study, as well as dollar amounts, distances, and amounts of time:

acoustics	dominoes	mathematics
billiards	economics	measles
cards	ethics	mumps
civics	gymnastics	news
crossroads	# hours	physics
darts	# metres	rabies
# dollars	linguistics	shambles

Note that most of these words will be plural if used other than meaning disciplines, fields of study, games, or number of units. For instance, when you're playing darts, you would use the plural verb in "Three darts **remain**" to refer to three individual darts in your hand but use a singular verb when saying "Darts **is** a way of life" because you're now using "darts" in the sense of the game rather than the object.

Correct:

*The **committee demands** action on the latest media blunder.*

Why it's correct: The collective noun "committee" is singular, despite being comprised of several people, and therefore takes the singular verb "demands," not the plural "demand."

Correct:

*A demolition **crew** of three sledgehammer-wielding heavies is levelling the house as we speak.*

Why it's correct: The collective noun "crew" is singular despite being followed by a prepositional phrase detailing how many people are in the crew. Despite also the plural noun "heavies" preceding the main verb, the singular "is" is the correct verb rather than the plural "are."

Correct:

***Food Basics has** a deal on for ice cream right now, and **Dolce & Gabbana has** some fresh new styles coming this season.*

Why it's correct: Though the subject nouns seem plural because one ends with s and the other compounds two names, being a single corporate entity in each case makes them singular and take the singular verb "has" rather than the plural "have."

Correct:

*Oh look, **green eggs and ham is** on the menu.*

Why it's correct: Though the subject noun seems plural because it is a compound of a plural and singular noun, it is considered one singular dish and therefore takes the singular verb "is" rather than the plural "are."

Correct:

*The **news is** so depressing today.*

Why it's correct: Though the subject noun seems plural because it ends with *s*, “news” is a singular noun taking the singular verb “is,” not the plural “are.”

Correct:

***Ethics isn't** an optional field of study for business professionals.*

Why it's correct: Though the subject noun seems plural because it ends with *s* and the singular “ethic” is also a legitimate word, it acts in this case as a singular entity because it is a field of study and therefore takes the singular verb “is.”

Correct:

***Five dollars** donated to the right charities is all that's needed to save a life.*

Why it's correct: Though the subject noun seems plural because it contains more than one dollar, it acts as a singular entity and thus takes the singular verb “is” regardless of the noun “charities” that comes before it in a prepositional phrase.

Correct:

***Ten kilometres** is too far to walk because those **ten kilometres are** going to make us late.*

Why it's correct: The first “Ten kilometers” is a grammatically singular subject because the distance as a whole is meant. The second instance refers to each individual kilometer together with the others, however, so it is grammatically plural, taking the plural pronoun “those” and verb “are.”

How This Helps the Reader

Following this rule helps the reader connect the singular grammatical subject performing a single action in concert as one entity with the main verb, especially when phrases of different number come between them.

What to Look for When Proofreading

Look for count nouns, as well as special-case nouns that look plural but are actually singular, such as games and areas of study, like those identified above. Ensure that the main verb following them is singular rather than plural.

Incorrect:

*A **pack** of lies averaging around twenty per day **are** winning over a confused and angry swath of the electorate.*

The fix: *A **pack** of lies averaging around twenty per day **is** winning over a confused and angry swath of the electorate.*

Incorrect:

*The **acoustics** in here **are** so bad that it makes me want to study **acoustics**, which **are** all about how sounds behave in certain environments.*

The fix: *The **acoustics** in here **are** so bad that it makes me want to study **acoustics**, which **is** all about how sounds behave in certain environments.*

In the first incorrect sentence above, the collective noun “pack” is grammatically singular and must therefore take the singular verb “is,” not the plural verb “are”), despite it being comprised of a plurality of things (“lies”) identified in the prepositional phrase following it. In the second incorrect sentence, we see two different types of the word “acoustics.” One type means “sound quality,” acts as a plural grammatical subject, and therefore takes the plural verb “are.” The other, meaning the study of how sounds interact with the environment, takes the singular verb “is,” not the plural verb “are.”

Subj-v Agr. Rule 2: Plural noun, compound noun, and plural indefinite pronoun subjects take plural verbs.

When the subject of the sentence is plural or contains two or more nouns or pronouns joined by and to make a compound subject, the verb describing the action they perform together is always plural regardless of whether the nouns are singular or plural. The verb is plural even if the compounded subject noun closest to the verb is singular. Other word types that take plural pronouns and verbs include:

- The indefinite pronouns *both*, *few*, *many*, *several*, and *others*
- Some items that seem singular because they are assembled into one unit, such as *binoculars*, *glasses*, *jeans*, *pants*, *scissors*, *shears*, and *shorts*
- Sport teams with singular names, such as the Colorado Avalanche and Tampa Bay Lightning
- Bands of musicians with singular-sounding names such as the Tragically Hip and Arcade Fire

Correct:

*Self-driving **cars** **are** going to revolutionize more than just the auto industry.*

Why it’s correct: The plural subject noun “cars” takes the plural main verb “are.”

Correct:

*Goodness, **we have** our work cut out for us.*

Why it's correct: The plural subject pronoun “we” takes the plural main verb “have”

Correct:

*All the network **systems** and the **mainframe** we've been updating **are** going to have to be liquidated now.*

Why it's correct: The compound subject with the plural noun “systems” and singular noun “mainframe” takes the plural main verb “are.” All the other verbs are part of embedded phrases that don't affect the verb number.

Correct:

*A **few** of them **say** they can't go, but **several are** still going.*

Why it's correct: The plural indefinite pronouns “few” and “several” take the plural verbs “say” and “are” respectively.

Correct:

*These **pants don't** fit, these **scissors don't** cut, and these **shears are** kaput.*

Why it's correct: Though each of these subject nouns sells as one item, they are considered pairs grammatically and therefore take plural verbs such as “don't” instead of the singular “doesn't.”

Correct:

*The **Tragically Hip** are playing their final concert in Kingston where they played their first show 32 years earlier.*

Why it's correct: As a five-piece band of musicians, the Tragically Hip are a grammatically plural noun despite having a singular-sounding name, and therefore take the plural verb “are.”

How This Helps the Reader

Following this rule helps the reader connect the doer of the action with the main action itself, especially when a variety of phrases, including nouns of different numbers, intervene between the subject noun and main verb.

What to Look for When Proofreading

Look for subject nouns (the main doers of the action) and the main verbs that the subject noun takes, then

ensure that both are plural. Look out especially for compound subjects with a singular noun close to the verb tricking you into making the main verb singular.

Incorrect:

*Most major **auto manufacturers** and, of course, **Tesla** **is** leading the way towards self-driving cars via a switch to all-electric drivetrains.*

The fix: *Most major auto **manufacturers** and, of course, **Tesla** **are** leading the way towards self-driving cars via a switch to all-electric drivetrains.*

Incorrect:

*I can respect their musicianship, but **Rush** just **annoys** me, or maybe it's just Geddy Lee's voice.*

The fix: *I can respect their musicianship, but **Rush** just **annoy** me, or maybe it's just Geddy Lee's voice.*

In the first incorrect example above, the proximity of the singular noun “Tesla” to the main verb probably made the confused writer think that the verb had to be the singular “is,” too. The subject is in fact a compound, however: “manufacturers and . . . Tesla.” Changing the main verb to a plural form easily fixes the subject-verb disagreement of number.

In the second incorrect example, the band Rush seems like it should be a singular noun and take the singular verb “annoys” because the word rush is singular; as a trio of musicians, however, the band is grammatically plural and takes the plural verb “annoy.” Notice, when we use the noun “band” in front of “Rush” so that “band” is grammatically the subject noun, however, we use a singular verb following Subj-v Agr. Rule 1.3 above.

Subj-v Agr. Rule 3: Compound subjects joined by *or* or *nor* take verbs that agree in number with the nouns closest to them.

When the subject of the sentence is a compound joined by the coordinating conjunction *or* or *nor*, the number (singular or plural) of the verb is determined by the subject noun that comes immediately before it.

Correct:

*Either the **players** **or** the **coach** **is** going to take the fall for the loss.*

Why it's correct: Though this is a compound subject comprised of the plural “players” and singular “coach,” the main verb is the singular “is” because “or” joins the two subject nouns and the one closest to the verb, “coach,” is singular.

Correct:

*When neither the project **lead** **nor** **dozens** of engineers **dare** to doubt the safety of the launch, you have all the makings of a Challenger-like disaster.*

Why it's correct: The plural subject pronoun “dozens,” as the second part of the compound subject including the singular “lead,” takes the plural main verb “dare” because it is closer.

How This Helps the Reader

Following this rule helps the reader see the two compounded subject nouns as separate actors performing the verb action independently of one another rather than together.

What to Look for When Proofreading

Look for plural verbs that disagree in number with singular subject nouns closest to them when the subject nouns are joined by *or* or *nor*.

Incorrect:

*A rock **or** a hard **place** **are** your only choice in this situation.*

The fix: *A rock **or** a hard **place** **is** your only choice in this situation.*

In the incorrect example above, the compounding of the two singular nouns likely made the confused writer think that the verb should be plural as it is when *and* compounds subject nouns. When *or* or *nor* compounds subject, however, the verb must agree with whatever subject noun comes immediately before it.

Subj-v Agr. Rule 4: The verb in clauses beginning with *there* or *here* agrees with the subject noun following the verb.

When a sentence or clause begins with the pronoun *there* or *here*, the subject noun follows the verb and therefore determines whether the verb should be singular or plural. In other words, what comes before the verb usually determines whether the verb is singular or plural, but in this case, what comes after the verb does that. In such expletive constructions, as they're called, *here* or *there* are not actually subjects.

Correct:

***There** **appears** to be a mighty **storm** approaching on the horizon.*

Why it's correct: The singular subject noun “storm” following the verb takes the singular verb “appears.”

Correct:

Here is a pencil and here are some forms you need to fill out.

Why it's correct: The singular subject noun “pencil” following the main verb takes the singular verb “is” in the first clause. The plural subject noun “forms” in the second clause takes the plural verb “are.”

Correct:

There happen to be six conditions on which the growth of our business depends.

Why it's correct: The plural subject noun “conditions” following the verb takes the plural verb “happen” rather than the singular “happens.”

Correct:

There is nothing to the allegations of wrongdoing.

Why it's correct: The singular subject noun “nothing” following the verb takes the singular verb “is” regardless of the plural noun “allegations” in the prepositional phrase modifying the subject noun.

Correct:

There are too many applications to sort through in the given timeframe.

Why it's correct: The plural subject noun “applications” following the verb takes the plural verb “are.”

How This Helps the Reader

In sentences beginning with the pronoun *there*, following this rule cues the reader towards the number of the subject noun before it appears.

What to Look for When Proofreading

Look for sentences or clauses beginning with *there* and ensure that the verb agrees with the noun that follows it. The verb isn't necessarily singular just because *there* comes before the verb (where the subject is usually located) and seems like a singular pronoun.

Incorrect:

I can't believe there just happens to be two tickets to the show you wanted to see in my pocket here.

The fix: *I can't believe **there** just **happen** to be two **tickets** to the show you wanted to see in my pocket here.*

Incorrect:

*Here **is** a bar graph and pie chart you can extrapolate results from.*

The fix: *Here **are** a bar graph and pie chart you can extrapolate results from.*

In the first incorrect sentence above, the pronoun “there” is not the subject noun of the relative clause following “that”; the plural noun “tickets” is the subject and therefore takes the plural verb “happen” rather than the singular “happens.” In the second incorrect sentence, the grammatical subject is the compound noun “bar graph and pie chart” following “Here,” so the main verb must be the plural “are,” not the singular “is.”

For more on subject-verb agreement and how to correct disagreement, see the following resources:

- Making Subjects and Verbs Agree (Paiz, Berry, & Brizee, 2018)
- Self Teaching Unit: Subject-Verb Agreement (Benner, 2000), including exercises

For more exercises, see Subject-Verb Agreement I and II (Darling, 2014c).

2. Pronoun Errors

For more on pronoun-antecedent disagreements of number (e.g., *Everybody has an opinion on this, but **they** are all wrong*), ambiguous pronouns (e.g., *The plane crashed in the field, but somehow **it** ended up unscathed—was the plane or field left unscathed?*), and pronoun case errors (e.g., *Rob and **me** are going to the bank—would you say “me is going to the bank”?*), see the following resources:

- Using Pronouns Clearly (Berry et al., 2013)
- Pronoun Case (Berry et al., 2010)
- Gendered Pronouns & Singular “They” (Berry et al., 2017)

For self-check exercises on correct use of pronouns, see Pronouns – Exercises (Darling, 2014d).

3. Faulty Parallelism

For more on parallelism, see the following resources:

- Parallel Structure (Driscoll, 2018a)
- Parallel Structure in Professional Writing (Driscoll, 2018b)

- Parallel Structure and Parallelism I exercise (Darling, 2014e)

4. Dangling and Misplaced Modifiers

For more on dangling modifiers, see the following resources:

- Dangling Modifiers and How to Correct Them (Berry & Stolley, 2013)
- The Dangling Modifier and The Misplaced Modifier (Simmons, 2011)
- Modifier Placement and the Modifier Placement I exercises (Darling, 2014f)

Key Takeaways



Writing sentences free of common grammar errors such as comma splices and subject-verb disagreement not only helps you avoid confusing the reader and embarrassing yourself, but also helps keep your own thinking organized.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the grammar rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the sentence and grammar errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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5.3: PROOFREADING FOR PUNCTUATION

Learning Objectives



1. Identify and correct punctuation errors involving commas, apostrophes, colons and semicolons, parentheses and brackets, quotation marks, hyphens and dashes, question and exclamation marks, and periods.
2. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

As the little marks added between words, punctuation is like a system of traffic signs: it guides the reader towards the intended meaning of the words just as road signs guide drivers to their destination. They tell the reader when to go, when to pause, when to stop, when to go again, when to pay close attention, and when to turn (Truss, 2003, p. 7). They're also crucial for avoiding accidents. A paragraph without punctuation—no periods, commas, apostrophes, etc.—quickly spins out into utter nonsense and kills the reader's understanding of the writer's meaning.

Punctuation that's merely missing or unnecessary here and there can confuse a reader and even lead to expensive lawsuits if they plague contentious documents like contracts. To anyone who knows how to use them, seeing punctuation mistakes in someone else's writing makes that other person look sloppy and amateurish. Punctuation errors by adult native English speakers look especially bad because they reflect poorly on their education and attention to detail, especially if they're habitual mistakes. The critical reader looks down on anyone who hasn't figured out how to use their own language in their 20+ years of immersion in it. Not knowing the difference between a colon and semicolon, for instance, is like not knowing the difference between a cucumber and a zucchini; sure they look alike from a distance, but they're completely different species and serve different culinary functions. If you don't know these differences by the time you're an adult, however, it doesn't take much to learn.

In this section, we focus on how to spot and correct common punctuation errors, starting with commas

because most problems with people’s writing in general are related to missing and misused commas. The goal is to help you avoid making mistakes that can potentially embarrass you in the eyes of people who should be taking you seriously.

Complete List of Punctuation Covered in This Chapter Section

- 5.3.1: Commas (,)
- 5.3.2: Apostrophes (’)
- 5.3.3: Colons (:)
- 5.3.4: Semicolons (;)
- 5.3.5: Parentheses ()
- 5.3.6: Brackets []
- 5.3.7: Quotation Marks (“ ”)
- 5.3.8: Hyphens (–)
- 5.3.9: Long Dashes (—)
- 5.3.10: Question Marks (?)
- 5.3.11: Exclamation Marks (!)
- 5.3.12: Periods (.)

5.3.1: Commas

Most punctuation problems are comma-related because of the important role commas play in providing readers with guidance on how a sentence is organized and is to be read to understand the writer’s intended meaning. As we saw in §4.3.2, commas signal to the reader where one clause ends and another begins in compound and complex sentences, but they serve several other roles as well. We use commas in four general ways, each with several variations and special cases. To these we can add rules about where not to add commas, since many writers confuse their readers by putting commas where they shouldn’t go. Most style guides advocate for using as few commas as possible, though you certainly must use them wherever needed to avoid ambiguities that lead readers astray. Closely follow the sixteen rules below to guide your reader towards your intended meaning and avoid confusing them with comma misplacement.

Quick Rules: Commas

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common comma errors associated with each one.

Comma Rule 1.1	<p>Put a comma before coordinating conjunctions in compound sentences. <i>The installers came to do their work at 8am, and the regulators came to inspect the installation by the end of the day.</i></p>
Comma Rule 1.2	<p>Don't put a comma between independent clauses in a compound sentence if not followed by a coordinating conjunction. <i>Our main concern is patient safety; we don't want any therapeutic intervention to cause harm. (semicolon rather than a comma after "safety")</i></p>
Comma Rule 2.1	<p>Put a comma after introductory subordinate clauses, phrases, or words preceding main clauses. <i>If we can't secure investor funding and launch the site by April, the clients will likely go elsewhere.</i></p>
Comma Rule 2.2	<p>Don't put a comma after main clauses followed by subordinate clauses or phrases unless the latter strikes a contrast with the former. <i>They're paying us a visit because they haven't seen us in a while. (no comma before "because")</i></p>
Comma Rule 3.1	<p>Put commas around parenthetical words, phrases, or clauses. <i>See my portfolio, which includes my best work, on ArtStation.</i></p>
Comma Rule 3.2	<p>Put a comma before contrasting coordinate elements, end-of-sentence shifts, and omitted repetitions. <i>He said, "go to Customer Service, not the checkout," didn't he?</i></p>
Comma Rule 3.3	<p>Put a comma before sentence-ending free-modifier phrases that describe elements at the beginning or middle of sentences. <i>We are putting in long hours on the report, writing frantically.</i></p>
Comma Rule 3.4	<p>Put commas around higher levels of organization in dates, places, addresses, names, and numbers. <i>Send your ticket to Gina Kew, RN, in Ottawa, Ontario, by Tuesday, October 9, 2018, for your chance to win the \$5,000,000 prize.</i></p>
Comma Rule 3.5	<p>Put a comma between a signal phrase and a quotation. <i>The reporter replied, "Yes, this is strictly off the record."</i></p>
Comma Rule 3.6	<p>Don't put commas around restrictive relative clauses (before that). <i>The purchased item that we agreed to return is now completely lost. (no comma before "that" and after "return")</i></p>
Comma Rule 3.7	<p>Don't put commas between subjects and their predicates. <i>The just reward for the difficult and dangerous job that Kyle performed for his clientele was the knowledge that they were safe. (no comma before "was")</i></p>
Comma Rule 4.1	<p>Put commas between each item in a series, including the last two items. <i>You must be kind, conscientious, and caring in this line of work.</i></p>
Comma Rule 4.2	<p>Put commas between two or more coordinate adjectives. <i>It was a cool, crisp, bright autumn morning.</i></p>
Comma Rule 4.3	<p>Don't put a comma after the final coordinate adjective. <i>The team devised a daring, ambitious plan. (no comma after "ambitious")</i></p>

Comma Rule 4.4	<p>Don't put a comma between non-coordinate adjectives. <i>David played his Candy Apple Red '57 reissue Fender Stratocaster electric guitar like he was flying a Saturn V rocket to the moon.</i> (no comma between the non-coordinate adjectives throughout)</p>
Comma Rule 4.5	<p>Don't put commas between two coordinate nouns or verbs. <i>Tesla and Edison invented and patented a complete circuit of electricity distribution systems and consumption devices.</i> (no commas before any “and” here)</p>

Extended Explanations

Comma Rule 1.1: Put a comma before coordinating conjunctions in compound sentences.

Put a comma before the coordinating conjunction (e.g., and, but, so; Darling, 2014a) that joins two independent clauses in a compound sentence. A compound sentence contains two or more clauses that can stand on their own as sentences (see Table 4.3.2b for more on compounds sentences) with a different subject in each clause.

Correct:

*We were having the time of our lives, **and** our lucky streak was far from over.*

Why it's correct: A comma precedes the coordinating conjunction “and” joining the independent clause beginning with the subject “We” and another beginning with the subject “our lucky streak.”

Correct:

*The first round of layoffs was welcomed by all, **but** the second devastated morale.*

Why it's correct: A comma precedes the coordinating conjunction “but” joining the independent clause beginning with the subject “The first round” and another beginning with the subject “the second.”

Correct:

*The management blamed external factors, **yet** none of the company's blunders would have happened under good leadership.*

Why it's correct: A comma precedes the coordinating conjunction “yet” joining the independent clause beginning with the subject “The management” and another beginning with the subject “none.”

Correct:

*You can take advantage of this golden opportunity, **or** a thousand other investors will take advantage of it instead as soon as they know about it.*

Why it's correct: A comma precedes the coordinating conjunction “or” joining the independent clause beginning with the subject “You” and another beginning with the subject “a thousand.”

Correct:

*He didn't see the necessity of lean principles, **nor** would they have made sense in a business model based on inefficiency.*

Why it's correct: A comma precedes the coordinating conjunction “nor” joining the independent clause beginning with the subject “He” and another beginning with the subject “they.”

Correct:

*Market forces left them behind, **for** the law of supply and demand isn't necessarily a force for social justice.*

Why it's correct: A comma precedes the coordinating conjunction “for” joining the independent clause beginning with the subject “Market forces” and another beginning with the subject “the law.”

Correct:

*The competition started to heat up, **so** we did everything we could to protect our assets.*

Why it's correct: A comma precedes the coordinating conjunction “so” joining the independent clause beginning with the subject “The competition” and another beginning with the subject “we.”

Exception:

If the two independent clauses are short (five words or fewer), the comma may be unnecessary.

Correct:

You bring the wine and we'll make dinner.

Why it's correct: A comma is unnecessary before the coordinating conjunction “and” joining the two short, four-word independent clauses beginning with the subjects “You” and “we.”

How This Helps the Reader

The comma tells the reader to pause a little after one independent clause ends and before the coordinating conjunction signals that another (with a new subject) is joining it to make a compound sentence. In each of

the examples sentences above, the **independent clause** on either side of the comma-conjunction combination could stand on its own as a sentence (see §4.3.1–§4.3.2 for more on sentence structure and independent clauses). In the first example above, for instance, we could replace the comma and conjunction with a period, then capitalize the o in “our,” and both would be grammatically correct sentences. We combine them with a comma and the conjunction *and*, however, to clarify the relationship between the two ideas. The comma signals that these are coordinated clauses rather than noun or verb phrases.

If the subject were the same in both clauses, however, both the comma and subject of the second clause would be unnecessary. In that case, the sentence would just be a one-subject clause with a compound predicate—that is, two coordinated verbs (see Comma Rule 4.4 below). Consider the following examples:

Correct:

We were having the time of our lives and would continue to enjoy that lucky streak.

Why it’s correct: The subject “we” is the same in the independent clauses “We were having the time of our lives” and “we would continue to enjoy that lucky streak,” so the comma and second “we” are omitted to make a compound predicate joining the verbs “were having” and “would continue” with the coordinating conjunction “and.”

Correct:

They won the battle but lost the war.

Why it’s correct: The subject “They” is the same in the independent clauses “They won the battle” and “they lost the war,” so the comma and second “they” are omitted to make compound predicate joining the verbs “won” and “lost” with the coordinating conjunction “but.”

What to Look for When Proofreading

Look for run-on sentences (see §5.2.1.2 above), which are sentences that omit a comma before the coordinating conjunction joining two independent clauses. Keep an eye out for the seven coordinating conjunctions *for*, *and*, *nor*, *but*, *or*, *yet*, and *so* (see Table 4.3.2a and use the mnemonic acronym *fanboys* to remember them). Simply add a comma before the conjunction if the independent clause on either side of the conjunction could stand on its own as a sentence because it has a subject and predicate (see §4.3.1 for more on sentence structure).

Incorrect:

*We were losing money with each acquisition **but** our long-term plan was total market dominance.*

Incorrect:

*We were losing money with each acquisition **but**, our long-term plan was total market dominance.*

The fix:

*We were losing money with each acquisition, **but** our long-term plan was total market dominance.*

In the example above, the coordinating conjunction “but” joins the two independent clauses beginning with the subjects “We” and “Our long-term plan.” Omitting the comma in the first example makes the sentence a run-on. Misplacing the comma after the conjunction in the second misleads the reader to pause after, rather than before, the conjunction. The easy fix is just to add the comma or move it so it goes before the conjunction.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 1.2: Don't put a comma between independent clauses in a compound sentence if not followed by a coordinating conjunction.

Don't put a comma between two independent clauses if it's not followed by a coordinating conjunction because this is a **comma splice** sentence error (see §5.2.1.1 above). We have two distinct ways of forming a compound sentence (see §4.3.2 above) and a comma splice confuses the two. One way of making a compound sentence is to join independent clauses by placing a comma and one of the seven “fanboys” coordinating conjunctions between them (see Table 4.3.2a for the coordinating conjunctions). Simply omitting the coordinating conjunction after the comma makes a comma splice. The other way of making a compound sentence is to end the first clause with a semicolon when it doesn't make sense to use any of the coordinating conjunctions to establish a certain relationship between the clauses (see Table §4.3.2b on sentence varieties for more on compound sentences and Semicolon Rule 1 below). Using a comma instead of a semicolon in such compound sentences makes a comma splice.

What to Look for When Proofreading

Look for commas separating two independent clauses (clauses that can stand on their own as sentences because they each have a subject and predicate) without any of the seven coordinating conjunctions (*for*, *and*, *nor*, *but*, *or*, *yet*, or *so*) following the comma.

Incorrect:

The first proposal was from the Davidson group, the second came from a company we hadn't seen before.

The fix:

The first proposal was from the Davidson group; the second came from a company we hadn't seen before.

The fix:

*The first proposal was from the Davidson group; **but** the second came from a company we hadn't seen before.*

The fix:

Though the first proposal was from the Davidson group, the second came from a company we hadn't seen before.

In the incorrect example above, the comma separates two independent clauses that can stand on their own as sentences if you replaced the comma with a period and capitalized the t in “the second.” You have three options for fixing the comma splice corresponding to the three examples above:

1. Replace the comma with a semicolon to make a compound sentence.
2. Add a coordinating conjunction, such as *but*, to make a compound sentence that clarifies the relationship between the clauses.
3. Add a subordinating conjunction, such as *Though*, at the beginning of the first clause to make it a dependent (a.k.a. a subordinate) clause. This makes the sentence a complex one (see §4.3.2 above for more on subordinating conjunctions and complex sentences).

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 2.1: Put a comma after introductory subordinate clauses, phrases, or words preceding main clauses.

Put a comma before the main clause (a.k.a. independent clause) when it is preceded by an introductory word, phrase (e.g., a prepositional or participial phrase), or subordinate clause (a.k.a. dependent clause) in a complex sentence.

Correct:

***If** we follow our project plan's critical path down to the minute, we will finish on time and on budget.*

Why it's correct: The comma separates the subordinate clause beginning with the subordinating conjunction “*If*” from the main clause (beginning with the subject “*we*”) that follows it.

Correct:

***When** my ship comes in, I'll be repaying every favour anyone ever did for me.*

Why it's correct: The comma separates the subordinate clause, beginning with the subordinating conjunction “When,” from the main clause that follows it, beginning with the subject “I.”

Correct:

***To** make ourselves better understood, we've left post-it notes all around the room.*

Why it's correct: The comma separates the introductory infinitive phrase, beginning with the infinitive verb “To make,” from the main clause that follows it, beginning with the subject “we.”

Correct:

***After** the flood, the Poulins took out some expensive disaster insurance.*

Why it's correct: The comma separates the introductory prepositional phrase, beginning with the preposition “after,” from the main clause that follows it, beginning with the subject “the Poulins.”

Correct:

***Greeting** me at the door, she said that I was a half hour early and would have to wait to see the director.*

Why it's correct: The comma separates the introductory participial phrase, beginning with the present participle (Simmons, 2001a) “Greeting,” from the main clause that follows it, beginning with the subject “she.”

Correct:

*The downturn of 2008 now **forgotten**, the investors threw other people's money around like it was 2007 again.*

Why it's correct: The comma separates the introductory absolute phrase, ending with the past participle (Simmons, 2001a) “forgotten,” from the main clause that follows it, beginning with the subject “the investors.”

Correct:

***Delighted**, she accepted their offer even with the conditions.*

Why it's correct: The comma separates the single-word introductory past-participle appositive (Simmons, 2001b) “Delighted” from the main clause that follows it, beginning with the subject “she.”

Correct:

***Therefore,** you are encouraged to submit your timesheet the Friday before payday.*

Why it's correct: The comma separates the introductory conjunctive adverb (Simmons, 2007b) “Therefore” from the main clause that follows it, beginning with the subject “you.”

Correct:

***However,** there's not much we can do if the patient refuses our help.*

Why it's correct: The comma separates the introductory conjunctive adverb “However” from the main clause that follows it, beginning with the subject “you.”

Correct:

***Yes,** please go ahead and submit your payment.*

Why it's correct: The comma separates the single-word introductory interjection “Yes” from the main clause imperative clause that follows it, the core of which is the verb “go.”

Correct:

***Hello,** Claude:*

Why it's correct: The comma marks the pause between the greeting word and name address in a respectful, semiformal salutation opening email.

Exception: The comma is unnecessary if the introductory dependent clause or prepositional phrase is short (fewer than four words) and its omission doesn't cause confusion.

Correct:

***At this point** we're not accepting any applications.*

Why it's correct: Omitting the comma after the short, three-word prepositional phrase doesn't cause confusion.

How This Helps the Reader

The comma tells the reader to pause a little prior to the main clause as if to say, “Okay, here's where the sentence really begins with the main-clause subject and predicate.” The main clause is the main point, whereas the subordinate clause that precedes it is relatively minor, providing context.

Recall from the lesson on sentence varieties (§4.3.2) that a complex sentence is one where a subordinating conjunction (Darling, 2014a) begins an independent or subordinate clause, which cannot stand on its own as a sentence. A subordinate clause (a.k.a. dependent clause) becomes part of a proper sentence only when it joins

a main (a.k.a. independent) clause. When that subordinate clause precedes the main clause, a comma separates them. The same is true when that main clause is preceded by a phrase (e.g., prepositional, infinitive, participial, gerund, etc.; Darling, 2014b) or even just a word such as an appositive participle (as in the “Delighted” example above) or conjunctive adverb (Darling, 2014c), as in the “Therefore” example above.

What to Look for When Proofreading

Look for words, phrases, or clauses preceding the main clause without a comma separating them. For this, you must know how to spot the main clause when it comes later in the sentence; in other words, you need to be able to spot the main grammatical subject (the doer of the action) and predicate (the action itself; review §4.3.1’s introduction to sentence structure). If the main subject is preceded by words, phrases, or clauses but not a comma, then you need to add one before the main clause.

Incorrect:

***Because** first impressions are lasting ones you must always come out swinging at the beginning of your presentation.*

The fix:

***Because** first impressions are lasting ones, you must always come out swinging at the beginning of your presentation.*

In the example above, “you” is the main grammatical subject that begins the main clause, whose main verb is “come.” The subordinate clause begins with the subordinating conjunction “Because” and ends at “ones,” so the comma must follow “ones” to separate it from the beginning of the main clause.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 2.2: Don't put a comma after main clauses followed by subordinate clauses or phrases unless the latter strikes a contrast with the former.

Don't put a comma after a main clause (a.k.a. independent clause) if it is followed by a subordinate (a.k.a. dependent) clause or phrase in a complex sentence. If the subordinate clause begins with a contrasting subordinating conjunction such as “although,” a comma must separate the two clauses.

Correct:

*You can't apply for permits from the city **because** you haven't even secured funding yet.*

Why it's correct: A comma is unnecessary because the subordinate clause, beginning with the subordinating conjunction “because,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*We will finish on time and on budget **if** we follow the critical path of our plan to the minute.*

Why it's correct: A comma is unnecessary because the subordinate clause, beginning with the subordinating conjunction “if,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*I'll be repaying every favour anyone ever did for me **when** my ship comes in.*

Why it's correct: A comma is unnecessary because the subordinate clause, beginning with the subordinating conjunction “when,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*The Poulins took out some expensive disaster insurance **after** the flood.*

Why it's correct: A comma is unnecessary because the prepositional phrase, beginning with the preposition “after,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*We're not accepting any applications at this time, **though** we might make an exception for a truly remarkable applicant.*

Why it's correct: A comma is necessary because the subordinate clause, beginning with the subordinating conjunction “though,” strikes a contrast with the main clause that precedes it, making a pause appropriate.

Correct:

*We could easily hire a new full-time assistant in the fourth quarter, **unless** our profit margin drops below 5% in the third.*

Why it's correct: A comma is necessary because the subordinate clause, beginning with the subordinating conjunction “unless,” strikes a contrast with the main clause that precedes it, making a pause appropriate.

How This Helps the Reader

The absence of the comma tells the reader to keep reading smoothly without pause between the main and subordinate clauses. In the case of the contrasting subordinate clause, however, the comma signals a pause as if to say that the subordinate clause is a kind of afterthought or qualification added to the main clause.

What to Look for When Proofreading

Look for commas unnecessarily added before subordinating conjunctions (see Table 4.3.2a for a list of subordinating conjunctions) in complex sentences where the subordinate clause follows the main clause and doesn't strike a contrast with it.

Incorrect:

*The technician is switching to plan B, **because** the manifold blew a gasket.*

The fix:

*The technician is switching to plan B **because** the manifold blew a gasket.*

Incorrect:

*The Goliath Games label was founded in 2003, **to** create the most innovative and progressive interactive entertainment.*

The fix:

*The Goliath Games label was founded in 2003 **to** create the most innovative and progressive interactive entertainment.*

In the examples above, the comma is simply unnecessary and should be deleted. It would be necessary, however, if the first sentence began with the subordinate clause beginning with “Because . . .” or after the infinitive phrase if the second sentence began with “To create . . .” In those cases, the comma would follow “gasket” and “2003” respectively and you would change the first letter in the main clauses to lowercase.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 3.1: Put commas around parenthetical words, phrases, or clauses.

Put commas before and after parenthetical or non-essential words, phrases, or clauses that would leave the sentence grammatically correct if you omitted them. Placed in the middle of a sentence between the subject and predicate or at the end of the sentence, however, those elements lend further detail to the words or phrases that come just before them. Commas in this way function as a lighter form of parentheses (see §5.3.5 below).

Correct:

*The promotion went to Mr. Speck, **who** neither wanted nor deserved it, to make it look like something was being done about the glass ceiling.*

Why it's correct: Like parentheses, the commas mark off the relative clause beginning with the relative pronoun “who” in the middle of the sentence, lending more information on the word coming just before (“Mr. Speck”).

Correct:

*Global Solutions went on a hiring spree, **which** was well-timed given the change in telecoms legislation that was about to come down.*

Why it's correct: The comma marks the switch to a restrictive relative clause beginning with the relative pronoun “which” after the main clause, lending more information to its final word, “hiring spree.” The restrictive relative clause is non-essential in the sense that the main clause still means the same thing if the restrictive clause were omitted.

Correct:

*We'll get back to you as soon as possible, **needless to say**.*

Why it's correct: The comma marks the switch to an interjection tacked onto the end of the sentence.

Correct:

*The second customer, **on the other hand**, absolutely loved the new colour.*

Why it's correct: The comma marks off a parenthetical prepositional phrase separating the subject from the predicate in the middle of the sentence.

Correct:

*The time for expressing interest in the buy-out option, **however**, had long since passed.*

Why it's correct: The commas mark off the conjunctive adverb “however” interjected between the subject and the predicate in the middle of the sentence.

Correct:

*We've heard that, **in fact**, the delegation won't be coming after all.*

Why it's correct: The commas mark off a parenthetical prepositional phrase interjected between the subject and the predicate in the middle of the sentence.

Correct:

*Always treat the customer with respect, unless of course certain behaviours, **such as belligerent drunkenness**, compel you to take a firm stand against them.*

Why it's correct: The commas mark off a parenthetical phrase offering an example interjected between the subject and the predicate in the middle of the dependent clause.

Correct:

*The nicest thing about you, **Josh**, is that you get the best work out of your employees by only praising achievements rather than criticizing mistakes.*

Why it's correct: The commas mark off a parenthetical appositive address clarifying who “you” is between the subject and the predicate in the middle of the sentence.

Correct:

*I sent the application to Grace Garrison, **the departmental secretary**, last Tuesday.*

Why it's correct: The commas mark off a parenthetical appositive noun phrase identifying the role of the person named.

Exceptions: When the appositive is so close to the noun it modifies that the sentence wouldn't make sense without it, omit the commas. Also omit commas:

- Before such as when exemplifying non-parenthetically
- Around restrictive relative clauses (i.e., those beginning with that; see Comma Rule 3.6)
- If too many commas would clutter the sentence, in which case you would drop any comma that wouldn't cause confusion if omitted

Correct:

Departmental secretary Grace Garrison received the application Tuesday.

Why it's correct: You can omit commas around the appositive following “Departmental secretary” because “Departmental secretary received the application” wouldn’t make sense unless “The” preceded it.

Correct:

*They offer competitive fringe benefits **such as** health and dental coverage, three weeks’ paid vacation per year, and sick leave.*

Why it's correct: A comma would be excessive before the “such as” phrase introducing the list of examples unless it appeared as a parenthetical aside in the middle of the sentence.

Correct:

*We don’t have to go, and **of course** they don’t have to take us.*

Why it's correct: Adding commas around “of course,” though technically correct, would be excessive and look cluttered, so the parenthetical commas drop in priority to the comma separating compounded independent clauses.

How This Helps the Reader

As light alternatives to parentheses, these parenthetical commas tell the reader to pause a little when a non-essential (a.k.a. parenthetical) point is interjected or tacked on to explain the word or phrase preceding it. Common parenthetical phrases include:

all things considered	however	needless to say
as a matter of fact	in addition	nevertheless
as a result	incidentally	no doubt
as a rule	in fact	of course
at the same time	in my opinion	on the contrary
consequently	in the first place	on the other hand
for example	in the meantime	therefore
furthermore	moreover	under the circumstances

Interestingly, this rule also helped the Atlantic Canada telephone company Bell Aliant cancel a contract with Rogers Communications over the use of telephone poles prior to Rogers’s intended five-year term, costing Rogers a million dollars and resulting in a bitter court battle in 2006. The dispute concerned the following sentence in the middle of the 14-page contract:

This agreement shall be effective from the date it is made and shall continue in force for a period of five (5) years from the date it is made, and thereafter for successive five (5) year terms, unless and until terminated by one year prior notice in writing by either party.

Without the comma after “terms,” you could read the contract as Rogers intended, which was to say that it

could be terminated with a year's notice any time after the first five years. By adding the second comma to make the “and thereafter” phrase parenthetical and therefore non-essential, however, Rogers in effect made the “unless . . .” clause apply to the first five-year term as well as to any subsequent term. That one misplaced comma thus gave Bell Aliant the right to cancel at any time.

Citing this parenthetical comma rule, the Canadian Radio-Telecommunications Commission (CRTC) ruled in favour of Bell Aliant at Rogers's expense (Austen, 2006). The CRTC later reversed its ruling when Rogers invoked the less ambiguous French version of the contract to force Aliant to return to its contractual obligations. Still, Rogers ultimately paid heavily for un-recouped losses during the contract's cancellation and in legal fees throughout the contract dispute, which dragged out till 2009 (Bowal & Layton, 2014). You can bet Rogers pays people to ensure its contracts are punctuated unambiguously now.

What to Look for When Proofreading

Look for words, phrases, or clauses that could be deleted from a sentence without making it grammatically incomplete. Add commas if none mark off the parenthetical word, phrase, or clause, or if the first is there but not the second (or vice versa) in the case of parenthetical elements ending a sentence.

Incorrect:

Emphasizing your spoken points with gesticulation which may sound like a dirty word can certainly help your audience understand them better.

The fix:

*Emphasizing your spoken points with gesticulation, **which may sound like a dirty word**, can certainly help your audience understand them better.*

Here, the non-essential parenthetical relative clause beginning with the non-restrictive relative pronoun which (see Table 4.4.2a, #7, for relative pronouns) and ending with “word,” could be deleted from the sentence and leave it grammatically complete. However, as an interjection, it clarifies the word that precedes it (“gesticulation”), and therefore has a place in the sentence, albeit one set apart from the rest.

Incorrect:

Let's start cooking Grandpa!

The fix:

*Let's start cooking, **Grandpa**!*

Here, the comma is crucial in signalling that Grandpa is being addressed. Without the comma, the sentence

recommends preparing Grandpa to be cooked and presumably eaten, which is hopefully not the intended meaning.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 3.2: Put a comma before contrasting coordinate elements, end-of-sentence shifts, and omitted repetitions.

Put commas before end-of-sentence:

- **Questions** that seek confirmation of the main-clause point by asking the opposite
- **Phrases** that begin with not and state what the main-clause point seeks to correct
- **Coordinate elements** that contrast or further extend the main-clause point

Correct:

*This presentation seems like it's gone on for days, **doesn't it?***

Why it's correct: The comma marks off the question added to the end of the sentence to ask whether the opposite of the main-clause point is true as a way of seeking agreement with it.

Correct:

*Please send the document to Accounts Receivable, **not Payable.***

Why it's correct: The comma marks off the contrasting element added to the end, abbreviating the clause “do not send the document to Accounts Payable,” which has the exact structure of the main clause, but shows only the words that differ from the main-clause wording rather than repeating most of it to make a compound sentence.

Correct:

*The potential we envision for AI is that it will at best bring a world of convenience and leisure, **at worst total annihilation.***

Why it's correct: The comma marks off the clause that states the complementary contrast to the first statement by omitting the repeated relative clause root “it will . . . bring.”

Correct:

*The president's statement to the media seemed incoherent, **even demented**.*

Why it's correct: The comma marks off the clause that extends the main clause statement assuming the same root structure.

How This Helps the Reader

The comma cues the reader to pause before the sentence shifts to contrasting elements, as well as to indicate that some phrasing from the first part of the sentence is being assumed rather than repeated in the second.

What to Look for When Proofreading

Look for run-on-like gaps where no punctuation separates the main clause from questions or contrasting phrases tacked on to the end of a sentence, and add the comma.

Incorrect:

This is a great time to be alive isn't it?

The fix:

*This is a great time to be alive, **isn't it?***

Here, the main clause ends with “alive,” and the follow-up recasting of the statement as an interrogative sentence (“isn't this the best time to be alive?”) abbreviated as “isn't it?” forms a run-on without any punctuation separating it from the main clause. The comma added between the clauses represents the words that were omitted to avoid repetition.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 3.3: Put a comma before sentence-ending free-modifier phrases that describe elements at the beginning or middle of sentences.

Put commas before phrases that appear at the end of a sentence but modify (describe) actions or things at the sentence's beginning or middle. As long as such phrases don't cause confusion with their ambiguity, they are free to either follow the noun they modify or appear at the end.

Correct:

*The MC desperately cued for applause, **clapping aggressively**.*

Why it's correct: The comma marks off the sentence-ending participial phrase starting with the present participle “clapping” describes the action “cued” in the middle of the sentence.

How This Helps the Reader

The comma signals to the reader that the phrase ending the sentence refers to something that came earlier in the sentence. Without a comma, the phrase would describe what came immediately before it.

What to Look for When Proofreading

Look for phrases (especially participial phrases—words ending -ing) at the end of sentences without commas preceding them but not making sense. If they indeed have commas preceding them but the participle could refer to more than one thing in the main clause, resolve the ambiguity by moving the phrase closer to the thing it modifies.

Incorrect:

*The bellhop held out his hand for a gratuity **smiling obsequiously**.*

The fix:

*The bellhop held out his hand for a gratuity, **smiling obsequiously**.*

Here, the omitted comma makes it seem like the gratuity is smiling obsequiously, which doesn't make sense. Adding the comma before “smiling” makes it clear that the bellhop mentioned earlier in the sentence is the one smiling.

Incorrect:

*The MC invited the plenary speaker to the stage, **bowing graciously**.*

The fix:

***Bowing graciously**, the MC invited the plenary speaker to the stage.*

The participial phrase is ambiguous when placed at the end of the sentence because it's unclear whether the MC or plenary speaker is bowing graciously. Moving the participial phrase to the beginning so that it is in apposition to the noun it modifies clarifies the sentence to say that the MC is bowing.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 3.4: Put commas around higher levels of organization in dates, places, addresses, names, and numbers.

Put commas around the:

- Year when preceded by a month and date
- Date when preceded by a day of the week
- Larger geographical region (e.g., province, state, country, etc.) when preceded by smaller one (e.g., city or town) in a sentence or long address line
- Title or credential (e.g., ND, MD, PhD) following a name
- Groups of thousands in large numbers

Correct:

*The release date of April 14, **2019**, will be honoured if there are no delays.*

Why it's correct: The commas mark off the year as parenthetical in the three-part date to ensure that there is no ambiguity about which April 14 (2018? 2020?) is intended.

Correct:

*We agreed to continue our meeting on Thursday, **January 28**, to cover the agenda items we didn't get to on Monday.*

Why it's correct: The commas mark off the calendar date as parenthetical after the day of the week to ensure that there is no ambiguity about which Thursday is intended.

Correct:

*Gord Downie was born in Amberstview, **Ontario**, to a traveling salesman father and stay-at-home mother.*

Why it's correct: The commas mark off the province as parenthetical after the smaller town to ensure that there is no ambiguity about which town is intended, assuming other towns in other provinces may share the same name.

Correct:

*Bowie was born David Robert Jones in London, **England**, on 8 January 1947.*

Why it's correct: The commas mark off the country as parenthetical after the city within it to ensure that there is no ambiguity about which city is intended (i.e., not the one in Ontario, Canada).

Correct:

*Send your inquiries to 1385 Woodroffe Avenue, **Ottawa**, ON K26 1V8.*

Why it's correct: The commas mark off the larger geographical region in which the street is situated.

Correct:

*Please welcome Daria Rimini, **RN**, to the department.*

Why it's correct: The commas mark off the person's credentials as non-essential to her name rather than initials in her name.

Correct:

*Send your inquiries to Albert Irwin, **Jr.**, at the email address below.*

Why it's correct: The commas mark off the generational tag following the name.

Correct:

*You can always trust old George Wilson, **Professor of English**, to make a mountain of a molehill.*

Why it's correct: The commas mark off the individual's professional title following their name.

Correct:

*The awards for damages ranged anywhere from a token **\$4,882** to a whopping **\$13,945,718**.*

Why it's correct: The commas mark off every group of thousand (three digits) to help the reader quickly recognize the magnitude of the number without counting the number of digits.

Exceptions:

Don't surround a year with commas if it follows only a month; use them only around years following a month and date. Also, drop the second comma if the larger geographical region is possessive in form.

Correct:

Recording began in November 2005 and continued to February 2006.

Why it's correct: Commas are unnecessary in general two-part dates.

Correct:

*The charm of London, **Ontario's** street buskers almost rivals that of its UK namesake.*

Why it's correct: A comma following the possessive form of the larger geographical region would look even more awkward than this. Of course, the sentence could be reworded as “The street buskers’ charm in London, Ontario, almost”

How This Helps the Reader

The commas tell the reader to pause a little within a detailed series of time, geographical, or name designations when adding a higher order of organization just as commas were used as light alternatives to parentheses in Comma Rule 3.1.

What to Look for When Proofreading

Look for years added to three-part dates, larger geographical regions added after cities and towns, or credentials added after names with either no comma added on either side of that year, region, or credential, or added only before it but not after. Add both or the second comma. If the date only has the month and year, but a comma or two surrounds the date, delete commas.

Incorrect:

We can probably fit you in for the procedure on Tuesday December 12.

The fix:

*We can probably fit you in for the procedure on Tuesday, **December 12.***

Here, the month and date follow the day of the week without a comma. Just add one between them.

Incorrect:

*They moved the release date to March 14, **2020** to allow enough time for post-production.*

The fix:

*They moved the release date to March 14, **2020,** to allow enough time for post-production.*

Here, the year gets the first of its two parenthetical commas but not the second, so just add one after the year.

Incorrect:

The company was founded in July, 1978, to address an urgent need.

The fix:

The company was founded in July 1978 to address an urgent need.

The commas around the year are unnecessary because it's only a two-part date. Just delete them.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 3.5: Put a comma between a signal phrase and a quotation.

Put commas between signal phrases and the quotations they introduce when the signal phrases end with a verb that gives rise to the quoted words or thoughts.

Correct:

*The chair of the meeting **shouted**, “We cannot proceed unless we have order.”*

Why it's correct: A comma separates the signal phrase ending with a verb from the quotation it introduces.

Correct:

*“Stay the course,” the supervisor **advised**, “and you shall soon find success.”*

Why it's correct: The parenthetical commas mark off the signal phrase interjected between quoted clauses.

Correct:

*You could tell she was **thinking**, “Is this guy for real?”*

Why it's correct: A comma separates the signal phrase ending with a verb from the quotation it introduces even if the quotation is merely thought rather than said.

Exception:

A comma is unnecessary if the signal phrase ends with the restrictive relative pronoun *that* or the quotation is a phrase incorporated into the sentence rather than a sentence or clause on its own.

Correct:

*The customer service rep said **that** “The offer expired on August 23, not the 24th” and they have a “no exceptions” policy due to the perishable nature of the product.*

Why it’s correct: The signal phrase ends with the restrictive relative pronoun *that*, which a comma doesn’t follow but could replace, and “no exceptions is a phrase rather than a clause or sentence.

Correct:

The customer service representative confirmed “August 23, not the 24” was the expiration date.

Why it’s correct: No comma follows the signal phrase because the quotation is just a phrase excerpt rather than a clause or sentence.

How This Helps the Reader

The comma cues the reader to pause as it abbreviates the relative pronoun *that*, which makes the comma unnecessary if it’s included.

What to Look for When Proofreading

Look for missing commas around quotations and add them between the signal phrase ending with a verb and the quotation, or look for unnecessary commas that split a sentence unnaturally, such as going before or after the *that* that precedes a quotation if present), and delete them.

Incorrect:

*The authorization **said** “Go for it.”*

The fix:

*The authorization **said,** “Go for it.”*

Here, the signal phrase omits a comma between the main verb and the quotation, so adding one corrects the error.

Incorrect:

*The current contract says clearly **that**, “overtime is time and a half.”*

The fix:

*The current contract says clearly **that** “overtime is time and a half.”*

Here, a comma unnecessarily follows the relative pronoun *that* perhaps because the writer thought that a comma should always precede the quotation. You could either delete the comma or “that,” but not both.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 3.6: Don't put commas around restrictive relative clauses (before *that*).

Don't put a comma before a restrictive relative clause (e.g., beginning with the relative pronoun *who* or *that*) following a main clause.

Correct:

The stocks that we all thought were going to offer the best returns are doing the worst.

Why it's correct: No commas surround the restrictive clause from “that” to “returns,” which is somewhat parenthetical in that the sentence could grammatically function without it (“The stocks are doing the worst”). However, this would be misleading because it implies that all the stocks are failing expectations, whereas the sentence focuses on only a subset. The vagueness resulting from omitting the restrictive clause proves that it is essential to the sentence's clarity.

Correct:

The students who presented first set the bar high for those who followed.

Why it's correct: No commas surround the restrictive clause from “who” to “first.” The clause is restrictive because it specifies a small group of students. Adding commas around the clause would make it non-restrictive (see Comma Rule 3.1 above) and would change the meaning of the sentence: it would mean that all the students presented first.

Correct:

She didn't say that we couldn't work together.

Why it's correct: No comma precedes the restrictive clause beginning with “that.”

How This Helps the Reader

The absence of the comma tells the reader that the relative clause starting with the relative pronoun *that* or *who* is essential to the meaning of the sentence and should be read smoothly without pauses around it. For more on restrictive and non-restrictive relative clauses, see Introduction and General Usage in Defining Clauses (Keck & Angeli, 2018) and Clauses (Darling, 2014d).

What to Look for When Proofreading

Look for commas preceding *that* or *who* and determine whether the meaning of the sentence would be significantly changed if you deleted the restrictive relative clause. If it would be, delete the commas.

Incorrect:

*You don't have to cite common-knowledge facts, **that** every source you can find agrees on.*

The fix:

*You don't have to cite common-knowledge facts **that** every source you can find agrees on.*

Here, the restrictive relative clause beginning with *that* is essential to the meaning because it clarifies what kind of facts are common knowledge. It is not interchangeable with the non-restrictive relative clause beginning with *which*, which requires a comma before it because it is non-essential (see Comma Rule 3.1 above). In the UK, writers often use “which” instead of “that” even in non-restrictive relative clauses without the comma preceding them. In North America, however, we distinguish the relative clause types by using a comma and *which* for non-restrictive clauses and *that* without a comma for restrictive clauses.

Incorrect:

*The students, **who** were caught plagiarizing, were each given a zero, whereas the rest did quite well.*

The fix:

*The students **who** were caught plagiarizing were each given a zero, whereas the rest did quite well.*

Here, the commas in the incorrect sentence say that all students were caught plagiarizing. Deleting the commas to make “who were caught plagiarizing” a restrictive relative clause brings the sentence back to the intended meaning, which is that a subset of students were caught plagiarizing and the rest did well.

- Return to Quick Rules: Commas

- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 3.7: Don't put commas between subjects and their predicates.

Don't put a comma between a clause's subject (even if it's a long one) and predicate (the main verb action) if there are no parenthetical elements between them.

Correct:

Participants who quit smoking because of the new treatment option were twice as likely to remain smoke-free as those who quit cold turkey.

Why it's correct: No comma separates the subject “Participants who . . . option” from the predicate “were . . . turkey” even though the subject is quite long at ten words.

Exception:

Adding a pair of commas between the subject and predicate is acceptable when they are divided by an interjection. See the fourth and fifth correct examples illustrating Comma Rule 3.1).

How This Helps the Reader

The absence of the comma tells the reader to read smoothly across the subject and predicate because they are the integral parts of a unified clause even if the subject is long.

What to Look for When Proofreading

Look for commas that separate the subject from the predicate when there are no parenthetical words or phrases, or non-restrictive clauses, separating them. For this, you must know how to spot the main-clause subject and predicate (review §4.3.1 on sentence structure) and delete any stray commas that come between them.

Incorrect:

All the businesses that benefitted from the new regulatory environment following the passing of Bill 134, have given back to their community.

The fix:

All the business that benefitted from the new regulatory environment following the passing of Bill 134 have given back to their community.

The subject of the above sentence is a long one because, following the core noun “businesses,” it contains a restrictive relative clause beginning with *that*, which contains prepositional phrases (“from the new . . .” and “of Bill 134”) and a participial phrase (“following . . .”). None of these length-extending units change the fact that there is no legitimate parenthetical interjection requiring commas between the subject and the predicate that begins with “have given.” The easy fix is just to delete the comma.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 4.1: Put commas between each item in a series, including the last two items.

Put commas between each item in a series, including before the *and* or *or* that separates the second-to-last (a.k.a. penultimate) and last items, whether those items be words, phrases, or even clauses in a series.

Correct:

*NASA sent the space shuttles Columbia, Challenger, Discovery, Atlantis, **and** Endeavour on 135 orbital missions from 1982 to 2011.*

Why it’s correct: A comma follows each noun in a series up to the penultimate one before the *and* joining the last two.

Correct:

*I gave them the option of either researching the content, preparing the PowerPoint, **or** doing the actual presentation.*

Why it’s correct: A comma follows each participial phrase in a series up to the penultimate one before the *or* joining the last two.

Correct:

*The presenters rehearsed before Week 5, during Reading Week, **and** again after Week 7.*

Why it’s correct: A comma follows each prepositional phrase in a series up to the penultimate one before the *and* joining the last two.

Correct:

*Mick Jagger and Keith Richards set the stage for other singer-guitarist power duos like Robert Plant and Jimmy Page, Freddie Mercury and Brian May, Steven Tyler and Joe Perry, Axl Rose and Slash, **and** Anthony Kiedis and John Frusciante.*

Why it's correct: A comma follows each compound noun phrase in a series up to the penultimate one before the *and* joining the last two pairs.

Correct:

*I can't stand comma splices, you have no patience for run-ons, **and** she won't tolerate sentence fragments.*

Why it's correct: In a compound sentence containing three independent clauses, a comma follows each clause up to the penultimate one before the *and* joining the last two.

How This Helps the Reader

The serial commas help separate each item in the series, and the one that comes before the coordinating conjunction and that joins the last two items (a.k.a. the “Oxford comma”), helps resolve various ambiguities that may arise without it (see some below). The question of whether to use the Oxford comma has been a long-running debate. Some style guides, such as the Canadian Press, Associated Press, and even institutions like Algonquin College, recommend omitting it because they advocate for as few commas as possible. However, they say nothing about situations where omitting the Oxford comma creates unavoidable ambiguity—that is, two interpretations that mean two very different things. The anti-Oxford comma side even has an anthem in the Grammy-winning indie band Vampire Weekend’s 2008 debut-album single “Oxford Comma,” which opens with the lyric “Who gives a f**k about the Oxford comma?”.

[https://www.youtube.com/watch?v=P_i1xk07o4g\[/embed\]](https://www.youtube.com/watch?v=P_i1xk07o4g[/embed])

However, grammarians, readers, and writers who care about clarity in writing, and even the plaintiffs awarded \$5 million in a US civil suit (as well as the defendants paying the price) certainly care about the Oxford comma. The significant confusion and even conflict that results from its absence in clutch situations justifies its inclusion in all. For instance:

- In a 2017-2018 civil case that went nearly as far as the US Supreme Court, Oakhurst Dairy of Portland, Maine, was ordered to pay its delivery drivers \$5 million due to the ambiguity caused by an omitted Oxford comma in state law. The law was soon amended to separate the last two items in a list of overtime pay exemptions to resolve the ambiguity (Victor, 2018).
- The inclusion or omission of the Oxford comma leads to two entirely different interpretations when names are listed. If you were to say, for instance, that you and two others must go to court, you would say, “Beth, Ian, and I must go to court.” Without the Oxford comma, however, you would be addressing

Beth (who now isn't going to court) to tell her that just you and Ian are going: "Beth, Ian and I must go to court," which is not what you originally meant.

- Appositive relations between items in a series also create ambiguities when omitting the Oxford comma. If an actor winning a big award in front of a national audience were to say, "I would like to thank my parents, God and Buffy Sainte-Marie," the absence of an Oxford comma makes "God and Buffy Sainte-Marie" appear to be an appositive noun phrase modifying "parents"—that is, she would imply that her parents are God and Buffy Sainte-Marie. By using the Oxford comma, she avoids this absurdity by thanking three entities: her parents, God, and Buffy Sainte-Marie—as intended.
- Omitting the Oxford comma is especially confusing if the items listed are a combination of paired and single items. If the list of pairs in the fourth correct example above omitted the Oxford comma, it would end with the absurdity of having the last four items appearing as singles with "and" awkwardly separating each: "... Steven Tyler **and** Joe Perry, Axl Rose **and** Slash **and** Anthony Kiedis **and** John Frusciante." Knowing the context of these pairings would help resolve the ambiguity, but if you were reading a list of unknown mixed single and paired items, you wouldn't know which was a single and which was a pair near the end without the Oxford comma. A list such as "A, B and C, D, E and F, G, H, I, J and K and L" would be ambiguous because you wouldn't know if the last three items paired J with K (and L is single) or K with L (and J is single).

If the Oxford comma is necessary to avoid ambiguity in such cases, it should be used as a rule in *all* cases. Writers shouldn't have to make a subjective judgment call about whether the reader would find it ambiguous with or without the Oxford comma because some readers are more astute than others. Except perhaps in titles where brevity is highly valued and no ambiguities of the kind listed above can confuse the reader, the Oxford comma should *always* be used.

What to Look for When Proofreading

Look for list of three or more words, phrases, or clauses in a sentence. If you don't see a comma before the *and* that separates the last two items, add one there.

Incorrect:

Our group is full of non-contributors, my friend and me.

The fix:

*Our group is full of non-contributors, my friend, **and** me.*

Omitting the Oxford comma in the incorrect example above suggests that you and your friend are non-contributors because "my friend and me" are in appositive relation to "non-contributors." Though you did not mean to say this, you are in effect offering yourself and your friend as particular examples of non-

contributors. By adding the Oxford comma, however, you now say that the group is comprised of you, your friend, and some non-contributors. With the Oxford comma, you and your friend are productive members rather than non-contributors despite being grouped with them.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 4.2: Put commas between two or more coordinate adjectives.

Put commas between two or more coordinate adjectives that refer to the same noun. **Coordinate adjectives** are those stacked in front of a noun in no particular order to describe the noun in multiple ways. You can tell that they're coordinate adjectives if you can (1) change their order and (2) add *and* between each without changing the meaning either way.

Correct:

The new hires turned out to be dedicated, ambitious employees.

Why it's correct: Both adjectives, “dedicated” and “ambitious,” describe the noun “employees” in no particular order, and you can replace the comma with an and to make “. . . dedicated and ambitious employees.”

Correct:

Would you like a nice, new, clean, dry diaper?

Why it's correct: All four coordinate adjectives describe the noun “diaper” in no particular order.

Correct:

The incessant, thunderous drum beat changed the rhythm of their hearts.

Why it's correct: The comma goes between “incessant” and “thunderous” because they are coordinate. The comma doesn't go between “thunderous” and “drum” because they are non-coordinate in that you can't change their order and add and between them without changing the meaning.

Correct:

Use SMS for brief, fast text message exchanges.

Why it's correct: The comma goes between “brief” and “fast” because they are coordinate. The

comma doesn't go after "fast," "text," or "message" because they are non-coordinate in that you can't change their order and add *and* between them without changing the meaning.

How This Helps the Reader

The commas distinguish coordinate from non-coordinate adjectives, and therefore what adjectives are incidental and which are intrinsic qualities of the noun they describe. For more, see *Commas: Coordinate Adjectives* (Write, 2012) and *Comma Tip 6: Use Commas Correctly with a Series of Adjectives* (Simmons, 2018a).

What to Look for When Proofreading

Look for a series of two or more adjectives preceding a noun without commas between them. If you can put *and* between them and change their order without changing the meaning of the sentence, they're coordinate adjectives that need commas between them.

Incorrect:

The day started off with a vicious unrelenting freezing rain.

The fix:

The day started off with a vicious, unrelenting freezing rain.

The only adjectives that could be swapped around and have *and* added between them are "vicious" and "unrelenting." The adjective "freezing" is locked in its position before the noun "rain" to mean the type of rain that makes the outside one huge ice rink. Therefore, you need to add a comma between "vicious" and "unrelenting," but not between "unrelenting" and "freezing."

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 4.3: Don't put a comma after the final coordinate adjective.

Don't put a comma after the second of two (or third of three, etc.) coordinate adjectives—i.e., between the final coordinate adjective and the noun it describes. See Comma Rule 4.2 above for a further explanation of coordinate *vs.* non-coordinate adjectives.

What to Look for When Proofreading

Look for coordinate adjectives preceding a noun with commas between them. If you can put *and* between them and change their order without changing the meaning of the sentence, they're coordinate adjectives that need commas between them.

Incorrect:

Select and use common, basic, information technology tools to support communication.

The fix:

Select and use common, basic information technology tools to support communication.

The only adjectives that could be swapped around and have *and* added between them are “common” and “basic.” In this case, “information technology” (a.k.a. “IT”) is a noun phrase that modifies the noun “tools,” so their order is locked in, making them non-coordinate.

- Return to Quick Rules: Commas
- Return to the Complete List of Punctuation Covered in This Chapter Section

Comma Rule 4.4: Don't put a comma between non-coordinate adjectives.

Don't put commas between non-coordinate adjectives—that is, between adjectives that are in a fixed order before the noun they modify and cannot have *and* added between them without changing the meaning of the sentence. See Comma Rule 4.2 above for a further explanation of coordinate vs. non-coordinate adjectives.

What to Look for When Proofreading

Look for coordinate adjectives preceding a noun with commas between them. If you can't put *and* between them and change their order without changing the meaning of the sentence, they're non-coordinate adjectives. Any commas between them must be deleted.

Incorrect:

Send the black, Pearl, drum kit to the heavy, metal drummer.

The fix:

Send the black Pearl drum kit to the heavy metal drummer.

The order is important in the first set of non-coordinate adjectives describing the noun “kit” because the type of kit we’re dealing with is a drum kit, so “drum” must come immediately before “kit.” The brand of drum kit is Pearl (capitalized because it is a proper noun), so “Pearl” precedes “drum kit.” The only adjective preceding these non-coordinate adjectives is “black,” but it is unaccompanied by another to make it a coordinate adjective, so there are no commas. Likewise, inserting a comma between “heavy” and “metal” splits the musical genre “heavy metal” serving as a non-coordinate adjective to “drummer,” so it misleadingly implies that the drummer is a 400kg led statue.

Comma Rule 4.5: Don't put commas between two coordinate nouns or verbs.

Don't put commas between two nouns (or noun phrases) or verbs (or verb phrases) joined by the coordinating conjunction *and* in a compound subject, predicate, or object.

What to Look for When Proofreading

Look for commas appearing before or after the coordinating conjunction *and* when it comes between nouns (or noun phrases) or verbs (or verb phrases), then delete them.

Incorrect:

The communications director from your company, and the same from our company met to discuss a common strategy.

The Fix:

The communications director from your company, and the same from our company met to discuss a common strategy.

This above sentence features a **compound subject**, meaning that two subjects (the two communications directors) perform the main action (“met”). Though each is followed by a prepositional phrase (“from . . .”), the comma between them must be deleted in the incorrect sentence to avoid impeding the reader.

Incorrect:

They applied for an extension, and worked all weekend on the report.

The fix:

They applied for an extension and worked all weekend on the report.

The sentence above has a **compound predicate**, meaning that the one subject (“They”) performed two actions (“applied” and “worked”). Again, the comma is unnecessary between them and must be deleted from the incorrect sentence. The comma would be necessary if the second verb had a different subject performing the action, in which case they would be two independent clauses in a compound sentence (see Table 4.3.2b and Comma Rule 1.1).

Incorrect:

*They can’t expect us to write both the report and memo, **and** not pay us.*

The fix:

*They can’t expect us to write both the report and memo **but** not pay us.*

The above sentence also has a **compound predicate** (“can’t expect” and “not pay”). Adding a comma makes this out to be a compound sentence, which it isn’t because the subject “They” is common to both actions. To avoid an “X and Y and Z” structure caused by having a compound object (“report and memo”) appearing just before the conjunction coordinating the second verb, the “and” joining the two verb phrases can simply be changed to “but.”

Incorrect:

*The teacher gave us a new deadline based on the revised schedule, **and** a slightly revised end-of-semester timeline.*

The fix:

*The teacher gave us a new deadline based on the revised schedule **and** a slightly revised end-of-semester timeline.*

The above sentences have a **compound object**, meaning that two objects (“deadline” and “timeline”) are acted upon by the verb “gave.” The objects here are in somewhat long noun phrases, but to add a comma between them (after “schedule”) would mislead the reader into thinking that this is a compound sentence with a new independent clause following “and.” Deleting the comma would ensure that the reader understands the sentence instead as a simple sentence with a compound object.

Return to Quick Rules: Commas

For more on commas, see the following resources:

- The Guide to Grammar and Writing’s Commas page, which includes a Comma Usage PowerPoint presentation and a Commas exercise (click on the image to the right; Darling, 2014e)
- Purdue OWL’s Extended Rules for Using Commas (Driscoll & Brizee, 2018) along with its Punctuation

Exercises: Commas (Purdue OWL, 2010).

- The Punctuation Guide’s Comma page (Penn, 2011a)
- The Grammar Book’s Commas page and its Commas Quiz 1 and Commas Quiz 2 (Straus, 2018a)

Return to the **Complete List of Punctuation Covered in This Chapter Section**

5.3.2: Apostrophes

Apostrophes are mainly used to indicate possession and contraction but are probably the most misplaced punctuation mark after commas. They can embarrass the writer who misuses them, show a lack of attention to detail, and confuse readers about whether a noun is singular or plural, possessive, a contraction, or just a misspelling. Used properly, apostrophes at the end of a noun cue readers that the noun following is possessed by what the noun preceding refers to. For instance, in “Uncle Tom’s cabin,” the apostrophe indicates that the cabin (noun) is owned by Uncle Tom. Placement of apostrophes before or after the *s* ending a word determines if the noun is plural or singular. They’re also used for contractions in informal writing such as you see at the beginning of this sentence. You have four main rules to follow when using apostrophes, as well as several special cases.

Quick Rules: Apostrophes

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common apostrophe errors associated with each one.

Apostrophe Rule 1.1	Put an apostrophe before the <i>s</i> ending a singular possessive noun. <i>Jenna’s goal is to find a money manager who can diversify her portfolio.</i>
Apostrophe Rule 1.2	Don’t put an apostrophe at the end of a simple plural noun. <i>Corben put on his glasses to see the looks on their faces.</i> (no apostrophe at the end of “glasses,” “looks,” or “faces”).
Apostrophe Rule 2.1	Put an apostrophe after the <i>s</i> ending a plural possessive noun. <i>All three companies’ bids for the contract were rejected.</i>
Apostrophe Rule 2.2	Don’t put an apostrophe before the <i>s</i> ending a non-possessive plural decade. <i>The corporation was in the black back in the 1940s.</i> (no apostrophe between the <i>o</i> and <i>s</i> in “1940s”)
Apostrophe Rule 3	Put an apostrophe where letters are omitted in contractions. <i>You’re saying that it’s not a mistake if they’re doing it twice?</i>
Apostrophe Rule 4	Put an apostrophe before a plural <i>s</i> following single letters. <i>Mind your p’s and q’s, son.</i>

Extended Explanations

Apostrophe Rule 1.1: Put an apostrophe before the *s* ending a singular possessive noun.

Put an apostrophe before the *s* added to the end of a singular noun when the noun or noun phrase following belongs to the noun preceding it. In the case of joint ownership in compound nouns (when two or more nouns have joint possession of the noun following), the apostrophe-*s* goes only at the end of the second or final noun.

Correct:

*Have you heard the story of Albert **Einstein's** brain?*

Why it's correct: The brain belongs to Einstein (singular), so the apostrophe and *s* indicate possession.

Correct:

*Grace **Jones's** formidable presence in **1985's** *A View to a Kill* electrified audiences.*

Why it's correct: The “formidable presence” belongs to Grace Jones. Though her name ends with an *s*, she is grammatically singular and therefore receives an apostrophe and *s* just like any other singular noun. The apostrophe and *s* are also added to the end of years to indicate that the noun following (in this case a James Bond film) occurred in that year.

Correct:

*I've always heeded my **brother-in-law's** financial advice.*

Why it's correct: The apostrophe and *s* are added to the end of a compound noun.

Correct:

***Reznor and Ross's** first soundtrack won a 2010 Oscar for Best Original Score.*

Why it's correct: The apostrophe and *s* are added to the end of the final noun in cases of joint possession. Saying “Reznor's and Ross's first soundtrack” would refer to solo soundtracks by each.

How This Helps the Reader

The apostrophe before the *s* signals to the reader that the preceding singular noun is in possession of the noun or noun phrase following. To test whether you are dealing with a case of possession, you can flip the order and insert “of the” between the nouns or noun phrases. In the first example above where the brain belongs

to Einstein, for instance, “the brain of Einstein” is a wordier equivalent of “Einstein’s brain” but confirms possession.

What to Look for When Proofreading

Look for *s* added to the end of words when your intention is to show possession, but you’ve omitted the apostrophe, making the word look like a simple plural. Add the apostrophe. Also, in cases where an apostrophe is added to the very end of a singular noun that ends in *s* to show possession (see the second correct example above), add another *s* rather than imply that the singular noun is plural.

Incorrect:

Mr. **Davis’ companies proposals** request is for a 33% funding increase.

The fix:

Mr. **Davis’s company’s proposal’s** request is for a 33% funding increase.

The incorrect sentence above contains three apostrophe errors:

- The company belongs to Mr. Davis, who is just one person and is therefore grammatically singular despite having a name ending in *s*. Perhaps the writer heard that you can’t have an “s’s” due to pronunciation concerns, but usually we pronounce this *Day-viss-ez* to indicate possession. Thrown by this and confusing the singular and plural possessive forms, the writer who omits the *s* and may cause the same confusion can avoid doing so by adding it.
- The proposal belongs to the company, but the apostrophe is omitted and the plural form of company (“companies”) is given instead of “company’s.” The error is likely due to the fact that the plural noun and singular possessive noun forms are **homophones**—they sound exactly alike but are spelled differently and mean different things (see homophone.com for several examples of such homophones). Correcting this is a simple matter of replacing “ies” with “y’s” at the end of the word.
- Finally, the request is in the proposal and thus belongs to it. Omitting the apostrophe makes the plural noun “proposals,” and fixing it is just a matter of adding the apostrophe before the final *s*.

- Return to Quick Rules: Apostrophes
- Return to the Complete List of Punctuation Covered in This Chapter Section

Apostrophe Rule 2.1: Put an apostrophe after the *s* ending a plural

possessive noun.

Put an apostrophe after the *s* at the end of a plural noun (a noun of two or more people, places, or things) when the noun or noun phrase following belongs to it.

Correct:

*The two **companies'** merger was finalized last month.*

Why it's correct: The apostrophe goes at the end of the plural noun “companies” to indicate that the noun following (“merger”) belonged to both.

Correct:

*The **Joneses'** family tradition includes rescuing ancient artifacts from dastardly villains.*

Why it's correct: The apostrophe is added to the end of “Joneses,” the plural of the surname “Jones,” meaning each individual Jones family member is in joint possession of the noun phrase following (“family tradition”).

Correct:

*I listed having had three **years'** experience in C++ coding on my résumé.*

Why it's correct: The apostrophe comes at the end of the plural “years” to indicate that the noun following happened in those years. This is a more concise alternative to saying “three years of experience.”

Exception:

When the plural form of the noun is irregular in that it doesn't end in *s* (e.g., “feet,” “children,” “men,” “mice,” “teeth”), use the singular possessive apostrophe-*s*.

Correct:

*Can you please point me to the **men's** room?*

Why it's correct: The singular possessive apostrophe-*s* form is added to the end of an irregular plural noun that doesn't end in *s* to indicate possession.

How This Helps the Reader

The apostrophe after the *s* tells the reader to read the noun as being a plural in possession of the noun or noun phrase following, as opposed to the apostrophe before the *s* signalling a singular possessive.

What to Look for When Proofreading

Look for plural words that end in *s* being in possession of the noun following without an apostrophe at the end, or the apostrophe added before the *s*. Either add the apostrophe to the end of the word or move the *s* there.

Incorrect:

*We've been granted two **months** grace.*

Incorrect:

*We've been granted two **month's** grace.*

The fix:

*We've been granted two **months'** grace.*

Here, the grace period belongs to the two months (plural), so omitting the apostrophe is incorrect because it leaves “months” as a simple plural. The apostrophe-*s* ending is also incorrect because it makes “month” singular, which disagrees with the “two” preceding. To correct these errors, the apostrophe must go after the *s* at the end of “months.”

- Return to Quick Rules: Apostrophes
- Return to the Complete List of Punctuation Covered in This Chapter Section

Apostrophe Rule 2.2: Don't put an apostrophe before the *s* ending a non-possessive plural decade

Don't put an apostrophe between the *l* and *s* when writing a plural decade that's not possessive (e.g., 1990s). Put an apostrophe at the end only if the decade is in possession of the noun or noun phrase following.

Correct:

*The **1980s'** main contribution to popular music was excessive cheesy synthesizers.*

Why it's correct: The apostrophe follows the plural decade, (meaning everything that happened from January 1, 1981, to December 31st, 1990) to show possession of the noun phrase “main contribution.” You could also say, “The main contribution of the 1980s to popular music was”

Correct:

***1980's** Academy Award for Best Picture went to Ordinary People.*

Why it's correct: The apostrophe precedes the *s* to mean that the event following happened in the year 1980.

How This Helps the Reader:

The apostrophe after the *s* signals to the reader that the noun or noun phrase following happened in the decade given. Some mistakenly put an apostrophe between the *0* and *s* when referring to the simple plural of a decade (e.g., 1990's), but this conflicts with the singular possessive form of the year (see the “1980's” example above). If the decade were also possessive, “1990's's” (with two apostrophes—one before and one after the *s*) would look awkward. The non-possessive apostrophe between the *0* and *s* is probably confusing the rule that places the contraction apostrophe before the last two digits of the year or decade (see the third example in Apostrophe Rule 3 below).

What to Look for When Proofreading

Look for an apostrophe-*s* added to the end of a decade and delete the apostrophe if the decade (or year at the beginning of the decade) isn't in possession of the following noun or noun phrase.

Incorrect:

*The **1990's** were a colourful decade in men's fashion.*

The fix:

*The **1990s** were a colourful decade in men's fashion.*

*The **'90s** were a colourful decade in men's fashion.*

In the incorrect sentence above, “1990's” is the singular possessive form of “1990,” meaning something belonging to the year 1990 should follow it rather than a verb. Perhaps the writer confused “1990's” with the contraction “'90s.” The apostrophe before the *s* must be deleted to make the simple plural “1990s,” meaning all the years from 1991 to 2000 inclusive.

- Return to Quick Rules: Apostrophes
- Return to the Complete List of Punctuation Covered in This Chapter Section

Apostrophe Rule 3: Put an apostrophe where letters are omitted in contractions.

Put an apostrophe wherever letters and characters (including spaces) have been omitted in contractions. **Contractions** are two (sometimes more) words combined into one word to represent the way they're often said quickly as one word in informal speech. In the examples below, the contractions would be incorrect if formal writing were expected by the audience but are correct as informal writing.

Correct:

*There's going to be a huge reckoning when markets adjust, and it **won't** be pretty.*

Why it's correct: The first apostrophes replace the omitted *i* in “There is” and the second for the *o* in “will not”)

Correct:

*I **wouldn't've** have said that if I knew you were sensitive about your nose.*

Why it's correct: The apostrophes replace the omitted *o* and *a* in the three-word phrase “would not have” contracted into one word.

Correct:

*She's been **bangin'** out hit records since the '70s.*

Why it's correct: The apostrophes replace the omitted space and *ha* in “She has,” final *g* in “banging,” and 19 in “1970s.”

Correct:

*It's a pretty bad cold, sure, but **'sbeen a while** and **'tis** the season, as they say.*

Why it's correct: The apostrophes replace the omitted space and *i* in the contraction for “It is,” *it ha* in “it has been,” and first *i* in “it is.”

Exceptions: Many contractions at the far end of informality typically omit even contractions.

Correct:

*I'm gonna get me a cold beer when this **shift's** over.*

Why it's correct: The first apostrophe replaces the omitted space and *a* in “I am,” and the second replaces the space and *i* in “shift is.” As a convention in the writing of *gonna* as a contraction of “going to,” apostrophes aren't used to replace the omitted *i*, *g*, *t*, and *o*.

How This Helps the Reader

The apostrophe replaces omitted letters in contractions and thus signals informal writing meant to represent the way we speak words informally, though they would be unacceptable in formal writing. Some common contractions that often confuse readers because they are homophones with other words include:

Table 5.3.2: Commonly Confused or Misspelled Contractions

Contraction	Meaning	Not	Meaning
can't	cannot	cant	slang
could've	could have	could of	("of" confused with "have")
I'd	I would	Id	agent of instinct to Freud
I'm	I am	Im	Cockney for "him"
it's	it is	its	possessive pronoun
I've	I have	Ive	(misspelled)
let's	let us	lets	a form of the verb <i>to let</i>
o'clock	of the clock	oclock	(misspelled)
should've	should have	should of	("of" confused with "have")
there's	there is / was	theirs	possessive pronoun
they're	they are	there / their	pronoun / possessive pron.
we're	we are / were	were	a form of the verb <i>to be</i>
where's	where is / was	wears	a form of the verb <i>to wear</i>
who's	who is / was	whose	possessive pronoun
who're	who are / were	whore	prostitute
would've	would have	would of	("of" confused with "have")
you're	you are / were	your	possessive pronoun

For a more exhaustive set, see the List of English contractions (Wikipedia, 2018).

What to Look for When Proofreading

Look for the absence of apostrophes in contractions and add them. Your spellchecker will help catch these in most cases (see Figure 5.1.4.8 above), but you must be especially careful in seeking them out if your spellchecker has any difficulty. Ensure also that you always use the form of apostrophe that looks like a small

superscript “9,” not “6” (the opening of single quotation marks; see Quotation Marks Rule 2) especially when placed at the beginning of words or numbers.

Incorrect:

*Its not like **there gone to** kick us out if **im** late and **your** hammered.*

The fix:

***It's** not like **they're gonna** kick me out if **I'm** late and **you're** hammered.*

The many errors in the incorrect sentence can be corrected in the following ways:

- *It's* (for “it is”) is meant rather than the third-person possessive pronoun *Its*
- *they're* (for “they are”) is meant rather than the pronoun *there*
- *gonna* (for “going to”) is meant rather than “gone to,”
- *I'm* (for “I am”) is meant rather than “im”
- *you're* is meant rather than the possessive pronoun “your”

Incorrect:

*I **cant** imagine life without **'70's** rock **n'** roll.*

The fix:

*I **can't** imagine life without **'70s** rock **n'** roll.*

The errors in the incorrect sentence can be corrected in the following ways:

- *can't* (for “cannot”) is meant rather than *cant*, meaning “slang.”
- *'70s* (for *1970s* with the apostrophe like a superscript “9”) is meant rather than the opening single-quotation mark (like a superscript “6”); the trick to getting the correct direction of apostrophe is to type any letter first, then the apostrophe to orient it in the form appearing as a small superscript “9,” and then go back to delete the letter in front of it
- *n'* (for “and”) is meant rather than the opening single-quotation mark (like a superscript “6”) appearing before the n; an apostrophe replacing the a, in addition to the one for *d*, is seen as excessive

- Return to Quick Rules: Apostrophes
- Return to the Complete List of Punctuation Covered in This Chapter Section

Apostrophe Rule 4: Put an apostrophe before a plural s following single letters.

Put an apostrophe wherever adding an s to make a simple plural would be confusing, such as pluralizing a single letter.

Correct:

*As my mom always said, “Mind your **p’s** and **q’s**, dot your **i’s**, and cross your **t’s**.”*

Why it’s correct: The apostrophes help form the plurals of the lowercase letters when they would otherwise look confusing as “ps” and “qs,” or ambiguous as “is.”

Correct:

*I’m aiming for straight **A’s** this semester.*

Why it’s correct: The apostrophe helps form the plural of the uppercase letters when it would otherwise look ambiguous as “As.”

How This Helps the Reader

The apostrophe helps the reader see these as plural forms of letters rather than as misspellings or typos.

What to Look for When Proofreading

In the rare case of using a plural form of a letter, separate the letter and its s with an apostrophe if you have omitted it.

Incorrect:

*You need to practice rolling your **rs** if you want to nail the Italian accent.*

The fix:

*You need to practice rolling your **r’s** if you want to nail the Italian accent.*

In the example above, omitting the apostrophe makes the plural of the letter *r* appear as a typo.

Return to Quick Rules: Apostrophes

For more on apostrophes, see the following resources:

- Guide to Grammar and Writing’s Apostrophes page (Darling, 2014f)

- Purdue OWL's The Apostrophe (2013) along with its Exercise: Apostrophes (n.d.)
- The Punctuation Guide's Apostrophe page (Penn, 2011b)
- The Grammar Book's Apostrophes page and its Apostrophes Quiz 1 and Apostrophes Quiz 2 (Straus, 2014a)

Return to the Complete List of Punctuation Covered in This Chapter Section

5.3.3: Colons

Quick Rules: Colons

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common colon errors associated with each one.



Colons and semicolons are often confused because of the similarities in both their names and form, though they perform quite different punctuation roles. A colon looks like a period stacked on top of another and is mainly used to equate information on either side of it somewhat like an equals sign (=) in math. A semicolon, on the other hand, looks like a period stacked on top of a comma. The semicolon usually separates independent clauses from one another in a compound sentence as an alternative to using a comma and a conjunction. They both have additional specific uses as we shall see below, starting with the colon.

Colon Rule 1.1	Put a colon at the end of a clause or phrase introducing a list. <i>NASA built six space shuttles:</i> Enterprise, Columbia, Challenger, Discovery, Atlantis, and Endeavour.
Colon Rule 1.2	Put a colon at the end of an opening salutation in formal emails and letters. <i>Dear Ms. O'Reilly:</i>
Colon Rule 2.1	Put a colon between an explanation and its introductory independent clause. <i>The error in our prototype led to the solution of quite another problem:</i> how to stabilize the transducer.
Colon Rule 2.2	Put a colon between a quotation and its introductory independent clause if the latter is a complete sentence. <i>What they were actually saying was much simpler:</i> "Either give us the money up front, or we won't install the program."
Colon Rule 2.3	Don't put a colon before a list or explanation preceded by a fragment. <i>Their three best albums are</i> Fully Completely, Day for Night, <i>and</i> Trouble at the Henhouse. (no colon after "are")
Colon Rule 3.1	Put a colon between a main title and its subtitle. <i>In the Realm of Hungry Ghosts:</i> Close Encounters with Addiction
Colon Rule 3.2	Put a colon between publisher locations and names in bibliographical references. <i>Toronto:</i> Nelson
Colon Rule 3.3	Put a colon between numbers in ratios and times. <i>There's a 3:1 chance that the experiment will end before the 8:23:40 mark.</i>

Extended Explanations

Colon Rule 1.1: Put a colon at the end of a clause or phrase introducing a list.

Put colon after a clause or phrase that introduces a list formatted either as a series separated by commas in the sentence or a bulleted or numbered stack down the page.

Correct:

We're going to need some branded stationery: business cards for all associates, letterhead and memo templates, post-it notes, pens, and USB sticks.

Why it's correct: The colon ends an independent clause (complete with a subject and predicate) that introduces a list arranged within the sentence.

Correct:

To find the date of a webpage that doesn't otherwise have one:

1. Type “inurl:” into the Google Search field, then copy and paste the URL of the webpage whose date you’re looking for immediately after it
2. Hit Enter and add “&as_qdr=y15” to the end of the search result URL in the address bar above the results page, which should show the title of the webpage whose date you’re looking for, but without the date yet
3. Hit Enter again and you’ll see the date appear in grey font below the webpage title in the updated results list

Why it’s correct: The colon ends an infinitive phrase that, as a dependent clause, is completed by each imperative sentence in the numbered list of procedural steps arranged down the page.

How This Helps the Reader

The colon cues the reader to read the information following as a list of items in parallel delivering on the promise made in the clause or phrase preceding it.

What to Look for When Proofreading

Look for lists either in sentence form with each item separated by a comma or in the form of a numbered or bulleted list. If no colons separate the introductory clauses or phrases from the lists that follow, add them. If semicolons or commas introduce the lists (see Semicolon Rule 3 below), replace them with colons.

Incorrect:

Four obstacles infuriate me on my rush to class through the hallways; inattentive people texting while walking, slow walkers, people who stop suddenly as if there’s no one behind them, and 4-5 people walking side-by-side, taking up the whole hallway.

The fix:

Four obstacles infuriate me on my rush to class through the hallways: inattentive people texting while walking, slow walkers, people who stop suddenly as if there’s no one behind them, and 4-5 people walking side-by-side, taking up the whole hallway.

In the example above, the writer made the common mistake of confusing a semicolon for a colon. Fixing it is a simple matter of replacing one with the other. See the example correct sentence for Colon Rule 2.1 below for a handy mnemonic for getting the right punctuation in these cases.

- Return to Quick Rules: Colons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Colon Rule 1.2: Put a colon at the end of an opening salutation in formal emails and letters.

Put a colon at the end of the opening salutation line where you address the recipient by name at the opening of a formal email or letter. In a semiformal email, a comma at the end of the salutation is fine. If an email is formal, however, a comma follows the greeting word (e.g., *Hello*) and the colon follows the recipient's name.

Correct:

Greetings, Greta:

Why it's correct: The colon following the semiformal email's opening salutation cues the recipient (Greta) to read the message following it.

Correct:

Dear Mrs. Jackson:

Why it's correct: The colon following the formal letter's opening salutation cues the recipient (Mrs. Jackson) to read the message following it.

Exception: In an informal message, a comma following the recipient's name (but not the greeting word) strikes a more casual tone in the opening salutation.

Correct:

Hi Hank,

Why it's correct: The comma following the informal message's opening salutation cues the recipient (Hank) to read the message following it.

How This Helps the Reader

The colon cues the reader to read the message following the salutation that addresses them by name.

What to Look for When Proofreading

Look for either no punctuation used at the end of an opening salutation address or other punctuation inappropriate for the occasion, such as a comma in a letter's salutation, or incorrect, such as a semicolon.

Incorrect:

Dear Mr. Bobrovsky,

Incorrect:

Dear Mr. Bobrovsky;

The fix:

Dear Mr. Bobrovsky:

In the first incorrect example, a comma used at the end of an opening salutation addressing the reader in a letter is too informal for the given channel. This suggests to the professional reader that the writer isn't up to date on business letter writing conventions. Modern business writers use a colon instead of a comma. Worse, the semicolon suggests that the writer is confused about the respective roles of colons and semicolons despite having had ample opportunity to learn them throughout their English-speaking lives.

- Return to Quick Rules: Colons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Colon Rule 2.1: Put a colon between an explanation and its introductory independent clause.

Put colon after an independent clause followed by a statement that explains in further detail what the introductory clause states in general. An independent clause is one that can stand on its own as a sentence beginning with a capital and ending with a period because it expresses a complete thought with a subject (doer) and a predicate (action; see §4.3.1 above). This colon usually stands for the causal transition phrase “—that is,”

Correct:

Imagining the colon elongating into an equals sign (=) is a useful way to remember what it does: equate information on either side of it.

Why it's correct: The independent clause ends with a colon and the verb phrase following explains what “does” means. Since the material to the right of the colon is a verb phrase rather than a complete sentence, the e in “equate” remains lowercase.

How This Helps the Reader

The colon cues the reader to read the phrase or clause to the right of the colon as an explanation of what the clause to the left of it says.

What to Look for When Proofreading

Look for combination statement-explanation sentence structures with either no punctuation between them or the wrong punctuation such as a semicolon, comma, or long dash (em dash).

Incorrect:

You have only one option left—delete the corrupted file from your hard drive and download the last version you saved to the cloud.

The fix:

You have only one option left: delete the corrupted file from your hard drive and download the last version you saved to the cloud.

In the incorrect sentence above, the writer made the common mistake of using the long dash as multipurpose punctuation for any pause you hear in speech. Fixing the sentence is a simple matter of replacing the long dash with a colon. You could alternatively add “that is, ” between the long dash and “delete,” but the colon makes for a more concise sentence with two fewer words.

- Return to Quick Rules: Colons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Colon Rule 2.2: Put a colon between a quotation and its introductory independent clause if the latter is a complete sentence.

Put a colon after an independent clause that introduces a quotation. Like the clause followed by an explanation in Colon Rule 2.1 above, it must be a complete clause that can stand on its own before the colon and quotation.

Correct:

The first joke he told was a groaner of the highest order: “What did the fish say when you put him in his tank? ... ‘Hey, how do you drive this thing?’”

Why it's correct: The quotation is introduced by an independent clause that ends with a colon, whereas a signal phrase that ends with a verb such as “said” is followed by a comma.

How This Helps the Reader

The colon cues the reader to read the quotation to the right of the colon.

What to Look for When Proofreading

Look for quotations preceded by a complete independent clause. If they don't have a colon separating them from the quotation, add one. Also, look for colons used to set up quotations when a comma is more appropriate, such as if the last word before the quotation is a verb, which would make the clause preceding the colon incomplete. In such cases, you would either replace the colon with a comma or rephrase the introductory fragment to make it an independent clause.

Incorrect:

Mama called the doctor and the doctor said: “No more monkeys jumping on the bed.”

The fix:

Mama called the doctor and the doctor said, “No more monkeys jumping on the bed.”

The fix:

Mama called the doctor and the doctor gave her an ultimatum: “Look, if another one of your children falls off the bed and gets a concussion, I’ll be reporting you to the Children’s Aid Society.”

In the example above, the clause preceding the colon and quotation is a compound with a fragmentary second clause missing an object after the transitive verb “said,” whereas it would have to be a complete independent clause to use a colon. Correcting it would be a simple matter of replacing the colon with a comma (see Comma Rule 3.5 above). Alternatively, you could make the introductory clause a complete and independent one, meaning it could stand on its own as a sentence, then use a colon before the quotation.

- Return to Quick Rules: Colons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Colon Rule 2.3: Don't put a colon before an explanation or quotation preceded by a fragment.

Don't put a colon before an explanation or list if the clause that precedes it is not an independent one—that is, if it cannot stand on its own as a sentence.

What to Look for When Proofreading

Look for colons ending phrases or incomplete clauses with lists or explanatory statements following, and simply delete them or rephrase the incomplete clause as a complete one. The incorrect sentence at the end of Colon Rule 2.2 above exemplifies an incomplete clause preceding a quotation; below is one preceding a list:

Incorrect:

***The remaining tasks include:** picking up the birthday cake, putting up the streamers, and wrapping the presents.*

The fix:

***The remaining tasks include** picking up the birthday cake, putting up the streamers, and wrapping the presents.*

The fix:

***The following tasks remain:** picking up the birthday cake, putting up the streamers, and wrapping the presents.*

In the example above, the colon ends an incomplete clause—incomplete because it has a subject and only half of the predicate. The verb “include” is transitive, which means that an object (a thing acted upon by the verb) must follow it (Simmons, 2007a). The objects here are gerunds, which are verbs in noun form ending in -ing (Simmons, 2018b) and are all on the other side of the colon, so the colon can just be deleted. Alternatively, the incomplete clause can be completed by changing the subject to “The following tasks” to set up the list and changing the verb to the intransitive “remain”—intransitive because it *doesn't* take an object (Simmons, 2008).

- Return to Quick Rules: Colons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Colon Rule 3.1: Put a colon between a main title and its subtitle.

Correct:

The Gutenberg Galaxy: The Making of Typographic Man.

Why it's correct: The colon separates main title from subtitle.

How This Helps the Reader

The colon distinguishes what should be known as the main title of the book, film, report, assignment, etc. Often this is a catchy, snappy handle for what to call it. The subtitle usually provides a little more practical information about what the work is about (see §4.6.1 above for more on titles).

What to Look for When Proofreading

Look for titles that have any punctuation other than colons between main titles and subtitles. Often the cover of a book positions the subtitle below the main title and in a smaller font, in which case a colon must be added when transcribing the title into a document.

Incorrect:

Amusing Ourselves to Death / Public Discourse in the Age of Show Business.

The fix:

Amusing Ourselves to Death: Public Discourse in the Age of Show Business

In the example above, the absence of punctuation separating the main title from the subtitle on the cover may have prompted the writer to make one up by using a slash. The convention for representing main titles and subtitles, however, is to separate them with a colon.

- Return to Quick Rules: Colons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Colon Rule 3.2: Put a colon between publisher locations and names in bibliographical references.

Put a colon between the location and company name of a publisher in APA References.

Correct:

Toronto: ECW.

Why it's correct: The colon separates location and publisher.

How This Helps the Reader

The colon is merely a convention for separating the publisher location and name. Readers like to know if the book is published in the major centres like New York or London, or if they're more local like Toronto or Vancouver.

What to Look for When Proofreading

Look for the part in bibliographical references of books where the publisher information is given. If any punctuation other than a colon separates them, replace it with a colon.

Incorrect:

New York, Random House.

The fix:

New York: Random House.

In the example above, the comma is non-standard punctuation separating the city where the book publisher is based and the name of the publisher. It must be replaced with a colon.

- Return to Quick Rules: Colons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Colon Rule 3.3: Put a colon between numbers in ratios and times.

Put a colon between numbers in mathematical ratios and to separate hours, minutes, and seconds when indicating time.

Correct:

A globe scaled 1:50,220,000 (or 790 miles to the inch) is one you can grip in the palm of your hand.

Why it's correct: The ratio colon indicates the relative size difference between the model (given as 1 here) and the real thing, which in this case is over fifty million times bigger than the model.

Correct:

Clocking in at 3:24:56, that film was three hours, twenty-four minutes, and fifty-six seconds too long.

Why it's correct: The colons divide units of time into hours, minutes, and seconds. After seconds, decimal-periods are used for fractions of seconds.

How This Helps the Reader

The colon expresses mathematical relationships and the division of units between numbers in a space-efficient manner.

What to Look for When Proofreading

Look for ratios and times to ensure that a colon is being used and that there are no spaces between it and the numbers on either side.

Incorrect:

My first marathon time was 3: 22: 15 and my second was a slower 3.26.44.

The fix:

My first marathon time was 3:22:15 and my second was a slower 3:26:44.

In the example above, errors in spacing and using non-standard punctuation are easily corrected by deleting spaces between the numbers and colons in the first time written and using colons instead of periods in the second.

- Return to Quick Rules: Colons

For more on colons, see the following resources:

- Guide to Grammar and Writing's Colons page along with its Semicolons, Colons, and Commas digital-activity exercises at the bottom (Darling, 2014h) (Darling, 2014g)
- Purdue OWL's Punctuation—Semicolons, Colons, and Parentheses page (Cimisko, 2018)
- The Punctuation Guide's Colon page (Penn, 2011c)
- The Grammar Book's Colons page and its Semicolons and Colons Quiz 1 and Semicolons and Colons Quiz 2 at the bottom (Straus, 2015a)
- Return to the Complete List of Punctuation Covered in This Chapter Section

5.3.4: Semicolons

Quick Rules: Semicolons

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common semicolon errors associated with each one.



Semicolons and colons are often confused because of the similarities in both their names and form, though they perform quite different punctuation roles. A semicolon looks like a period stacked on top of a comma and is mainly used to separate independent clauses from one another in a compound sentence as an alternative to using a comma and a conjunction. A colon, on the other hand, looks like a period stacked atop another and is mainly used to equate information on either side of it somewhat like an equals sign (=) in math. They both have additional specific uses as we saw above with colons in §5.3.3 above and will now see with semicolons.

Semicolon Rule 1	Put a semicolon between related independent clauses to make a compound sentence. Yes, we finished the marketing report you asked for; it's printed and bound in your departmental mailbox.
Semicolon Rule 2	Put a semicolon between sub-lists in a series of lists in a sentence. <i>Italicize words, phrases, and clauses for emphasis or when you refer to them as such; the titles of books, albums, feature-length films, and websites; and ships, named aircraft, and other named vehicles.</i>
Semicolon Rule 3	Don't put a semicolon where a colon should be used. <i>We can be thankful for what Oscar taught us: that being kind to our canine companions brings immense joy to our lives. (colon used after "us" to set up an explanation, not a semicolon)</i>

Extended Explanations

Semicolon Rule 1: Put a semicolon between related independent

clauses to make a compound sentence.

Put a semicolon between independent clauses whose content is so closely related that it makes sense to keep them in the same sentence, though they have different grammatical subjects (doers of the action). An independent clause is one that can stand on its own as a complete sentence because it has a subject (doer) and predicate (action) (see §4.3.1). A compound sentence joins two independent clauses either with a comma and coordinating conjunction (and, but, so, etc.; see Table 4.3.2a) or with a semicolon. Doing neither would make a run-on sentence, and using only a comma between the clauses would make a comma splice. Use a semicolon in compound sentences where none of the seven coordinating conjunctions is appropriate to use or where you need to be as concise as possible and can do without the conjunction without sacrificing clarity.

Correct:

The new website is nearly ready to launch; we just need to set some SEO controls and publish it.

Why it's correct: The semicolon joins the independent clause beginning with the subject “The new website” and the other with the subject “we.” Both could stand on their own as sentences but are closely related enough to be in the same sentence.

How This Helps the Reader

The semicolon helps the reader see where one clause ends and another (with a different grammatical subject) begins. It also signals that these are two closely related ideas worth joining in the same sentence.

What to Look for When Proofreading

Look for compound sentences punctuated with anything other than a semicolon (e.g., a comma, which makes a comma splice; see §5.2.1.1) or with no punctuation at all between them (run-on sentences; see §5.2.1.2). For this you really must know sentence structure well enough to spot the grammatical subject of a main (a.k.a. independent) clause so that you can tell if a second subject begins a new independent clause within a sentence but without the necessary punctuation preceding it. Review §4.3.1 above on sentence structure if you need a refresher.

Incorrect:

We would like to see less personal cellphone use from employees during working hours, however you can of course use your cellphone in an emergency.

The fix:

We would like to see less personal cellphone use from employees during working hours; however, you can of course use your cellphone in an emergency.

The incorrect sentence above is a comma splice because it uses only a comma to separate two independent clauses (see Comma Rule 1.2). The error is easier to spot if you imagine deleting the conjunctive adverb *however*. Replacing the comma with a semicolon and adding a comma after the conjunctive adverb easily fixes the problem.

Incorrect:

You can put the meeting in the calendar make it so we get a notification the day before.

The fix:

You can put the meeting in the calendar; make it so we get a notification the day before.

The incorrect sentence above is a run-on sentence because it contains two independent clauses without any punctuation between them. Adding a semicolon quickly makes the sentence a properly punctuated compound sentence.

- Return to Quick Rules: Semicolons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Semicolon Rule 2: Put a semicolon between sub-lists in a series of lists in a sentence.

Use semicolons as a “super comma” between groups of items in a long list of items arranged in a sentence.

Correct:

Please send T4s to Brenda, Albert, and Joan in Accounting; Jeremy, Lorraine, and Drew in Marketing; and Jasmine, Lily, and Alphonso in Legal.

Why it’s correct: The semicolon acts as a “super comma” that separates three sub-lists of three employees each according to their respective department in an office.

How This Helps the Reader

The semicolon helps the reader see subgroups within a long list that would be confusing if it included *ands* between the two last items in each subgroup throughout.

What to Look for When Proofreading

Look for sentences that contain long lists and see if there are internal groupings that can be separated with semicolons rather than commas.

Incorrect:

She was a kind mother, sister, and daughter, a dedicated public servant, business owner, and campaigner for progressive issues, as well as a kind soul with an insatiable curiosity, brilliant mind, and a big heart.

The fix:

She was a kind mother, sister, and daughter; a dedicated public servant, business owner, and campaigner for progressive issues; as well as a kind soul with an insatiable curiosity, brilliant mind, and a big heart.

In the incorrect example above, the long list of items is internally organized into groups of family and professional roles, as well as personal qualities. To help the reader follow these divisions as they switch from one group to another, the semicolon acts as a “super comma.”

- Return to Quick Rules: Semicolons
- Return to the Complete List of Punctuation Covered in This Chapter Section

Semicolon Rule 3: Don't put a semicolon where a colon should be used.

Don't use semicolons as if they were interchangeable with colons. They are different punctuation marks performing different functions. Review the semicolon rules above and compare with §5.3.3 on uses for colons.

What to Look for When Proofreading

Look for semicolons and determine if they are being used appropriately in the manner described in the rules above, or if they are actually performing the functions of colons explained and exemplified in §5.3.3 above. You can jump straight to every instance of a semicolon throughout your document by performing a word search (ctrl. + f) and just typing in a semicolon (;).

Incorrect:

Please send notifications to the following people; your family, friends, employer(s), legal representative(s), and financial planner(s).

The fix:

Please send notifications to the following people: your family, friends, employer(s), legal representative(s), and financial planner(s).

In the incorrect example above, the semicolon is being used to introduce a list of items, which is the function of a colon (see Colon Rule 1). Simply replacing the semicolon with a colon corrects the error.

- Return to Quick Rules: Semicolons

For more on colons, see the following resources:

- Guide to Grammar and Writing’s Semicolon’s page along with its Semicolons, Colons, and Commas digital-activity exercises at the bottom (Darling, 2014h)
- Purdue OWL’s Punctuation—Semicolons, Colons, and Parentheses page (Cimisko, 2018)
- The Punctuation Guide’s Semicolon page (Penn, 2011d)
- The Grammar Book’s Semicolons page and its Semicolons and Colons Quiz 1 and Semicolons and Colons Quiz 2 at the bottom (Straus, 2014b)
- Return to the Complete List of Punctuation Covered in This Chapter Section

5.3.5: Parentheses

Quick Rules: Parentheses

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common parentheses errors associated with each one.



Parentheses are often confused with brackets because they look alike and perform similar functions. Parentheses are curved lines that surround qualifying, non-essential elements, whereas brackets are squared, open-ended boxes used for very specific parenthetical situations. Let’s take a closer look at the occasions for which we would use parentheses rather than brackets or even commas.

Parentheses Rule 1.1	Put parentheses around qualifying interjections of lesser importance within and between sentences. <i>He put the folder (the green one, not the blue) in the filing cabinet thinking it was a client file rather than an administrative one.</i>
Parentheses Rule 1.2	Don't use parentheses where parenthetical commas would do. <i>He put the green folder, not the blue one, in the filing cabinet.</i> (commas used instead of parentheses)
Parentheses Rule 2	Put parentheses around in-text citations crediting research sources in APA and MLA documentation styles. Cellphones are giving youths neck and back problems typically seen in much older people (Cuéllar & Lanman, 2017).

Extended Explanations

Parentheses Rule 1.1: Put parentheses around qualifying interjections of lesser importance within and between sentences.

Use parentheses around interjections within a sentence where using parenthetical commas would lead to confusion. You can also use parentheses around an entire sentence that offers an aside that helps explain something said in the sentence previous. Parentheses always come in pairs: an **opening parenthesis** signals the beginning of an interjection of lesser importance, and a **closing parenthesis** signals the return to the sentence proper. When used around an entire sentence, the closing parenthesis goes *after* the sentence-ending period; otherwise, it goes before.

Correct:

We called pest control to get our office back from the vermin (silverfish, mites, house flies, fruit flies, and spiders) that seem to have taken up residency this past year.

Why it's correct: The parentheses mark off a list that digresses from the main point of the sentence with a series of illustrative examples. Parentheses are a better alternative to parenthetical commas because they would confuse the reader with two different types of commas: parenthetical and series.

Correct:

I've come around in my opinion of the common house centipede. (I used to squash them at first sight.) It turns out that they're effective pest control agents themselves.

Why it's correct: The parentheses mark off a whole sentence as a slightly digressive aside interrupting the flow of the main point.

How This Helps the Reader

The parentheses guide the reader towards reading the words, phrases, and clauses surrounded by them as being of lesser importance but still offering insight into what comes immediately before them.

What to Look for When Proofreading

Look to make sure that the parentheses you use genuinely set off words, phrases, or clauses that help explain those that came before them, and that the parentheses both open and close. If you use parentheses around a whole sentence, ensure that the closing parenthesis goes to the right of the period rather than to the left.

Incorrect:

I know house centipedes, scutigera coleoptrata, are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

Incorrect:

I know house centipedes (scutigera coleoptrata, are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The fix:

I know house centipedes (scutigera coleoptrata) are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The incorrect example above uses parenthetical commas to set off the Latin name of the insect referred to in the first clause, then uses a Rule 1.1 comma to crowd the area with commas. Parentheses would be more appropriate here, as well as in the second incorrect example that omits the closing parenthesis. The second sentence also places the parenthetical element at the end of the clause rather than where it should be: immediately after the common name of the insect it explains.

Incorrect:

The next time you see a house centipede stuck in your bathtub, throw it a lifeline. (Don't try to pick it up; they're extremely fragile and fall apart at the slightest touch). Just rest one end of a metre stick on the edge of the tub and put the other end inside so the little guy can use it as a ramp to climb up and out.

The fix:

The next time you see a house centipede stuck in your bathtub, throw it a lifeline. (Don't try to pick it up;

they're extremely fragile and fall apart at the slightest touch.) Just rest one end of a metre stick on the edge of the tub and put the other end inside so the little guy can use it as a ramp to climb up and out.

The incorrect sentence places the closing parenthesis to the left of the period ending the parenthetical sentence; if the parenthetical sentence were deleted along with the parentheses, the period would be stranded between sentences. Correcting this involves simply moving the period so it goes to the left of the closing parenthesis.

- Return to **Quick Rules: Parentheses**
- Return to the Complete List of Punctuation Covered in This Chapter Section

Parentheses Rule 1.2: Don't use parentheses where parenthetical commas would do.

Don't overuse parentheses, especially where parenthetical commas would be more appropriate. Recall that, according to Comma Rule 3.1, commas can surround parenthetical, non-essential words, phrases, and clauses added to explain immediately what came before. Whether you use commas or parentheses, the sentence must make grammatical sense without the interjected element. The problem with overusing parentheses, however, is that it clutters up your writing with distracting asides, so the less conspicuous comma is preferable in situations where a parenthetical element doesn't need full parentheses.

What to Look for When Proofreading

Look to make sure that the parentheses you use can't be replaced with commas without causing confusion. In other words, if the parenthetical element follows Comma Rule 3.1 and doesn't involve other types of commas covered by the other rules, then use commas instead of parentheses.

Incorrect:

At the same time, the market dropped a few thousand points (which wouldn't have been so bad if it didn't stay down for so long), so no one was buying anything.

The fix:

At the same time, the market dropped a few thousand points, which wouldn't have been so bad if it didn't stay down for so long, so no one was buying anything.

The incorrect example above includes a restrictive relative clause beginning with *which*, which is a perfect example of a non-essential parenthetical clause that we saw being set off from the main clause in Comma Rule 3.1 above. In this case, commas would be better to use than parentheses.

- Return to Quick Rules: Parentheses
- Return to the Complete List of Punctuation Covered in This Chapter Section

Parentheses Rule 2: Put parentheses around in-text citations crediting research sources in APA and MLA documentation styles.

Correct:

Others argue that “text neck” is neither a true epidemic nor even a true ailment (Skwarecki, 2018), just as “book neck” was never a condition that concerned anyone.

Why it’s correct: The parentheses mark off an APA-style in-text citation.

How This Helps the Reader

The parentheses tell the reader that the quotation, paraphrase, or summary came from the author or authors named within the parentheses. The reader can then consult the References section at the end of the document and easily find the full bibliographical reference for that source by searching out the same author last name in the alphabetical list of source authors. When citing multiple works by the same author, the year of publication in the citation allows the reader to distinguish between them (see §3.5.2–§3.5.3 above for more on citations and references).

What to Look for When Proofreading

Look to make sure that you use parentheses rather than brackets if your documentation style is APA or MLA. IEEE, on the other hand, does use brackets, albeit with a numerical citation rather than author and year.

Incorrect:

“Text neck” results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books [Shoshany, 2015].

The fix:

“Text neck” results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books (Shoshany, 2015).

The incorrect sentence above uses brackets rather than parentheses to mark off an in-text citation. Use parentheses for APA or MLA in-text citations.

- Return to Quick Rules: Parentheses

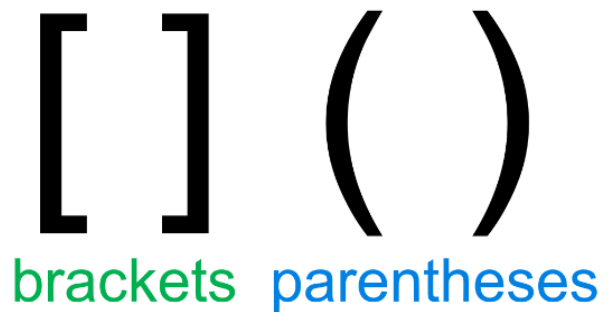
For more on parentheses, see the following resources:

- Purdue OWL’s Punctuation—Semicolons, Colons, and Parentheses page (Cimisko, 2018)
- The Punctuation Guide’s Parentheses page (Penn, 2011e)
- The Grammar Book’s Parentheses and Brackets page and its Question Marks, Quotation Marks, and Parentheses Quiz 1 linked at the bottom (Straus, 2014c)
- Return to the Complete List of Punctuation Covered in This Chapter Section

5.3.6: Brackets

Quick Rules: Brackets

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common bracket errors associated with each one.



Brackets are often confused with parentheses because they look alike and perform similar functions. Brackets are squared open-ended boxes used for more specific parenthetical situations than their curved-line counterparts. Let’s take a closer look at the occasions for which we would use brackets rather than parentheses.

Brackets Rule 1.1	Put brackets around changes or additions to the wording of quotations. <i>He clearly wrote that “The contract [was] for \$1.2 million [CDN] over five years” back in 2012.</i>
Brackets Rule 1.2	Don’t put brackets around what should have parentheses. <i>There’s no law of physics (at least not technically) that keeps top athletes from running the 100m in under 9 seconds. (parentheses appropriate instead of brackets)</i>
Brackets Rule 2	Put brackets around parenthetical elements within parentheses. <i>We didn’t have a clue what was causing the issue (we scoured the troubleshooting manual [Brulé, 2012]), so they shut it down.</i>
Brackets Rule 3	Put brackets around numerical in-text citations crediting research sources when required to use IEEE style. <i>Cellphones are giving youth neck and back problems typically seen in much older people [1].</i>

Extended Explanations

Brackets Rule 1.1: Put brackets around changes or additions to the wording of quotations.

Correct:

The president tweeted that “All of the phony T.V. commercials against [him were] bought and payed [sic] for by SPECIAL INTEREST GROUPS.”

Why it’s correct: The first brackets change the original “me are” to “him were” to be consistent with the third-person orientation and past-tense verb in the signal phrase. The bracketed “[sic]” indicates that the quotation’s spelling mistake was in the original source and intentionally kept rather than introduced by the writer when repeating the quotation.

How This Helps the Reader

The brackets indicate what changes the writer makes to a quotation, whether to lend clarity to the original wording or to make it grammatically consistent with the sentence around it. Doing so shows a concern for both quoting accurately and writing correctly. Sneaking in some changes to a quotation to suit your purposes is called misquoting. Sometimes the additions draw attention to errors in the original, such as corrections to the spelling or the use of “[sic],” short for the Latin *sic erat scriptum* (“thus was it written”), to preserve the author’s error.

What to Look for When Proofreading

Ensure that quotations are exact transcriptions of the original to avoid misquoting. If you find any intentional changes, surround them with brackets. Ensure also that any errors in the original quotation are preserved but identified with “[sic]” immediately following.

Incorrect:

Apple’s 1997 slogan encourages you to “Think different” by using their computers for outside-the-box solutions.

The fix:

Apple’s 1997 slogan encourages you to “Think different [sic]” by using their computers for outside-the-box solutions.

The fix:

Apple's 1997 slogan encourages you to "Think different[ly]" by using their computers for outside-the-box solutions.

The incorrect example above contains a quotation that is grammatically incorrect in its original form. Adding “[sic]” ensures the reader that the critical writer is well aware that, with “think” being a verb, “different” would have to be the adverb “differently” to be correct. Adding the -ly ending in brackets takes a more corrective approach to the error.

- Return to Quick Rules: Brackets
- Return to the Complete List of Punctuation Covered in This Chapter Section

Brackets Rule 1.2: Don't put brackets around what should have parentheses.

What to Look for When Proofreading

Ensure that the brackets you use don't follow either of the parentheses rules explained in §5.3.5 above.

Incorrect:

I know house centipedes [scutigera coleoptrata] are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The fix:

I know house centipedes (scutigera coleoptrata) are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The incorrect example above mistakenly uses brackets around the parenthetical Latin name of the insect identified just before by its common name. Following Parentheses Rule 1.1, however, you would just replace the brackets with parentheses.

- Return to Quick Rules: Brackets
- Return to the Complete List of Punctuation Covered in This Chapter Section

Brackets Rule 2: Put brackets around parenthetical elements within parentheses.

Use brackets whenever you have parenthetical elements within a phrase or clause that is already surrounded by parentheses.

Correct:

Though “text neck” is controversial (some argue that it was only ever a chiropractors’ marketing gimmick [Skwarecki, 2018]), it makes sense that neck strain sustained for several hours daily harms our musculoskeletal health.

Why it’s correct: The brackets mark off an in-text citation within a parenthetical statement. If not within parentheses, the citation would be framed by parentheses instead of brackets.

How This Helps the Reader

Brackets help the reader keep track of nested parenthetical elements. Switching to brackets for parenthetical elements within parentheses also helps avoid the awkwardness of “double-chin” parentheses such as “)).”

What to Look for When Proofreading

Look to make sure that you don’t double up parentheses with “))” anywhere in your document.

Incorrect:

The snake-oil rhetoric of Dr. Fishman’s website undermines the credibility of his “text neck” concept (with a chronic lack of proper citations for research supporting his claims (Fishman, 2018)).

The fix:

The snake-oil rhetoric of Dr. Fishman’s website undermines the credibility of his “text neck” concept (with a chronic lack of proper citations for research supporting his claims [Fishman, 2018]).

In the incorrect sentence above, parentheses are used within parentheses. Simply replace the inner parentheses with brackets.

- Return to Quick Rules: Brackets
- Return to the Complete List of Punctuation Covered in This Chapter Section

Brackets Rule 3: Put brackets around IEEE-style numerical in-text

citations crediting research sources.

Correct:

Physiopedia recommends holding up your mobile device so that it's level with your eyes and avoiding "prolonged static postures" [4].

Why it's correct: The brackets mark off an IEEE-style numerical in-text citation.

How This Helps the Reader

The brackets tell the reader that the quotation, paraphrase, or summary came from the research source numbered within the brackets. The reader can then consult the References section at the back and easily find the full bibliographical reference for that source by the corresponding number (see §3.5.4 above for more on IEEE-style citations and references).

What to Look for When Proofreading

Look to make sure that you use brackets rather than parentheses if your documentation style is IEEE, as opposed to APA or MLA, which use parentheses.

Incorrect:

Shoshany argues that "Text neck" results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books (5).

The fix:

Shoshany argues that "Text neck" results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books [5].

In the incorrect example above, parentheses are used rather than brackets to mark off an in-text citation. The correct in-text citation style for IEEE is to use brackets instead.

- Return to Quick Rules: Brackets

For more on brackets, see the following resources:

- The Punctuation Guide's Brackets page (Penn, 2011f)
- The Grammar Book's Parentheses and Brackets page and Question Marks, Quotation Marks, and Parentheses Quiz 1 linked at the bottom (Straus, 2014c)

- [Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.7: Quotation Marks

Quick Rules: Quotation Marks

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common quotation mark errors associated with each one.



double single
quotation marks

Quotation marks are mostly used to set reported speech or text apart from the author’s words. They essentially say, “These are someone else’s words, not mine.” But some writers confuse double quotation marks (simply called “quotation marks” here) with single quotation marks, as well as misplace punctuation around quotation marks, so let’s focus on when and how to use quotation marks, as well as single quotation marks, properly. Since the absence of quotation marks when using research sources in your document can result in plagiarism (see §3.4.1 and §3.5.1 above), knowing how to use them correctly is vitally important to your success as a student and professional.

Quotation Marks Rule 1.1	Use quotation marks to indicate reported speech or text. <i>She said, “Put the G-8320 form on the shared drive,” not in your personal Dropbox, “so that it’s available to all the associates.”</i>
Quotation Marks Rule 1.2	Use quotation marks in pairs to begin and end a quotation.
Quotation Marks Rule 1.3	Use a comma between a verb (or verb phrase) introducing a quotation and the quotation itself.
Quotation Marks Rule 1.4	Capitalize the first letter in a quotation unless it’s only a fragment of one.
Quotation Marks Rule 1.5	Place periods and commas <i>before</i> the closing quotation mark, not after.
Quotation Marks Rule 1.6	Place colons and semicolons <i>after the closing quotation mark, not before.</i> <i>Like the main character in the 1998 Coen Brothers’ film The Big Lebowski, “the dude abides”; in other words, I’ll be compliant.</i>
Quotation Marks Rule 1.7	Place question and exclamation marks <i>before</i> the closing quotation mark if they’re part of the quotation and <i>after</i> if they’re part of the sentence framing the quotation. <i>I thought you were kidding when you asked, “How can I help?”!</i>
Quotation Marks Rule 1.8	Quote exactly what’s between quotation marks; otherwise, use brackets to indicate changes made to words and ellipses for omissions. <i>Prime Minister Trudeau insisted that “Bilingualism [was] not an imposition on the citizens. . . . [It was] an imposition on the state” (Problems of Journalism, 1966).</i>
Quotation Marks Rule 1.9	Don’t use quotation marks around a paraphrase (a.k.a. indirect quotation). <i>Prime Minister Trudeau insisted that the people were forcing two official languages on the country rather than the other way around.</i> (no quotation marks around the indirectly quoted speech)
Quotation Marks Rule 2	Use quotation marks as “scare quotes” to draw attention to the way a word or phrase is used by others. <i>You can’t simply “phone this one in” because too many people will be depending on you doing this right.</i>
Quotation Marks Rule 3	Use single quotation marks only for reported speech within a quotation. <i>The interviewer then asked, “What did you mean when you said, in 1997, ‘The great thing about the hockey world is that there are a lot of people with loose lips?’” (Fitz-Gerald, 2015).</i>
Quotation Marks Rule 4	Use quotation marks around the title of a short work within a larger work such as an article in a magazine or journal, webpage in a website, chapter in a book, song on an album, short film or TV episode in a series, etc. <i>The article “Bill Gates and Steve Jobs Raised Their Kids Tech-free—and It Should Have Been a Red Flag” (Weller, 2018) made me reflect on my own technology addiction.</i>

For more on quotations, see §3.4.1 above and the following resources:

- The Guide to Grammar and Writing’s Quotation Marks page, along with the digital-activity exercises at the bottom of the page (Darling, 2014i)
- The Purdue OWL’s series of modules, starting with How to Use Quotation Marks (Conrey, Pepper, & Brizee, 2017) and ending with the exercises in the fifth module
- The Grammar Book’s Quotation Marks page and its Question Marks, Quotation Marks, and

Parentheses Quiz 1 and Question Marks, Quotation Marks, and Parentheses Quiz 2 linked at the bottom (Straus, 2007a).

5.3.8: Hyphens

Using hyphens between two or more words in combination helps the reader treat them as if they were one word when the words around them would create ambiguity without the hyphen(s). We do this especially with compound modifiers, which are two or more adjectives that modify the same noun in combination. For instance, if you said that there was funding available for small business owners, does that mean funding is only available for people who are under five feet tall? (In that case, “business owners” is read as a compound noun and “small” is the adjective modifying it.) If you mean that funding is available for business owners who employ fewer than 15 people, then you want to use the compound-modifier hyphen to pair up “small” and “business” so that they are read as if they were one adjective modifying the noun “owners”: *small-business owners*. Hyphens help the reader by guiding them toward what words to pair up when it could go either way.

The same is true of hyphens used in compound nouns. Saying, “It was a light year” means something completely different from “It was a light-year.” In the first case, you’re saying that nothing much happened that year; in the second, you’re saying that something spanned nearly ten trillion kilometres. Hyphens matter!

- <https://ruthlesseditor.com/compound-modifiers/>
- <http://www.btb.termiumpplus.gc.ca/tcdnstyl-chap?lang=eng&lettr=chapsect2&info0=2>

5.3.8.1: Compound-modifier Hyphens

The most common use of hyphens is for compound modifiers—that is, two or more adjectives that must be read in combination before a noun they describe. In fact, the hyphen you see between “compound” and “modifier” in the sentence above exemplifies how this works: since both of those words together (and in that order only) modify the noun “hyphen” (“modify” meaning that they tell you what kind of hyphen it is), the hyphen helps the reader identify which words function as modifiers and which as nouns, since “modifier” in this case behaves as an adjective rather than a noun. Without the hyphen, the reader might make the mistake of taking “modifier hyphen” as a compound noun, as in the case of “small business owners” above.

If you were to say that the USSR was the first second world country to de-communize, the combination “first second” would surely trip up the reader. But pairing “second” and “world” with a hyphen resolves the ambiguity to say “The USSR was the first second-world country to de-communize.”

Table 5.3.8.1a: Common First-term Nouns in Compound

Modifiers

Noun	Examples	Not Following a Noun
bottom- or top-	bottom -feeding fish top -shelf liquor top -tier player	Those fish are bottom feeding . All your liquor is top-shelf . The players we churn out are all top-tier .
high- or low-	high -calibre bullet low -cost solution high -fidelity sound low -life criminal high -quality products low -resolution screen	Most of the bullets found were high calibre . Let's find a solution that's low-cost . I want a sound that's more high fidelity . He is a total low-life . We ship products that are mostly high quality . Don't use pictures with low resolution .
self-	self -driven woman self -inflicted wound self -motivated boy self -taught pilot	She is very self-driven . We don't treat wounds that are self-inflicted . He is not self-motivated enough. I am totally self-taught .
well-	well -known solution well -thought-out plan well -trained army well -written letter	The solution is very well known . My plan is very well thought out . We're no match for an army so well trained . Only send the letter if it is well written .

Table 5.3.8.1b: Common Adverbs in Compound Modifiers

Noun	Examples	Not Following a Noun
fast- or slow-	Fast -moving process Slow -motion replay	The process is fast-moving after that. Let's review the goal in slow motion .
well-	well -chosen words well -known solution well -thought-out plan well -trained army well -written letter	Your words were all well-chosen . The solution is very well known . My plan is very well thought out . We're no match for an army so well trained . Only send the letter if it is well written .

Exception: Don't add hyphens after adverbs ending in *-ly*.

Table 5.3.8.1c: Common Prefixes Making Compound Modifiers

Prefix	Examples	Not Following a Noun
all-	all -inclusive resort all -powerful tech giant all -out offensive	Let's just go to an all-inclusive . Google's dominance has made it all-powerful . We sent everyone so our offensive was all-out .

Table 5.3.8.1d: Common Middle-term Prepositions in Three-part Compound Modifiers

Preposition	Examples	Without a Noun Following
-at-	Stay- at -home mom	You work and I'll just stay at home .
-by-	case- by -case basis six- by -six rule	We're just taking it case by case. Follow the rule called "six by six"
-for-	word- for -word translation	Don't copy word for word .
-of-	Cost- of -living index Out- of -province funding	The cost of living is always rising. The funding came from out of province .
-on-	one- on -one game	Let's play one on one .
-to-	Back- to -back classes business- to -business retailer coast- to -coast flight easy- to -follow presentation up- to -date calendar	My two classes today are back to back . Our sales are B2B (business to business). I'm flying coast to coast tonight. Your presentation was very easy to follow. My calendar is all up to date .

Table 5.3.8.1e: Common Three-part Compound-modifier Phrases

Examples	Without a Noun Following
Long-drawn-out affair	The affairs would all be long drawn out.
Off-the-charts happiness	I wish you happiness that is totally off the charts.
On-the-job training	All of the training will be done on the job.

Table 5.3.8.1f: Common Foreign-phrase Compound Modifiers

Examples	Without a Noun Following
Avant-garde filmmaker	His latest film is more avant garde.
Laissez-faire capitalism	Our approach is fairly laissez faire.

Don't hyphenate more recently imported foreign phrases that are still italicized.

Table 5.3.8.1g: Common End-term Nouns in Compound Modifiers

Noun	Examples	Without a Noun Following
-class	first- class cabin second- class citizen economy- class seating	I'm going first class . They treated me like I was second class . We bought economy class .
-degree	first- degree burns	I had burns in only the first degree .
-interest	Special- interest groups	All of those groups are special interest .
-ready	Game- ready athlete Job- ready graduate	All of our kids are game- ready . My training makes me fully job- ready .
-scale	Large- scale project	I've never done a project this large scale .
-time	full- time job half- time show part- time employment	She works full time . Let's talk about it at half time . We work part time on weekends.

Table 5.3.8.1h: Common Past-participles Following Nouns

Past Participle	Examples	Not Following the Noun
-based	evidence- based treatment faith- based reasoning	The treatment is evidence- based . The programming is all faith- based .
-bodied	Able- bodied teenager	You're able- bodied enough.
-capped	Snow- capped mountains	The mountains are nicely snow- capped .
-edged	double- edged sword	That sword is doubled edged .
-eyed	cross- eyed goofball	She went cross- eyed after a mule kick.
-faced	Two- faced charlatan	That guy is so two- faced .
-filled	garbage- filled bins	Those bins are all garbage filled .
-focused	solution- focused apology	The apology was solution focused .
-footed	Fleet- footed deliverer	The delivery man is fleet- footed .
-handed	Left- handed writer Right-handed stick Short-handed goal	We want a writer who is left handed . Pass me a stick that's right handed . The goal was short- handed .
-oriented	audience- oriented writing client- oriented response	The writing is more audience- oriented . Make it more client- oriented .
-sided	many- sided issue eight- sided dice	The issue is many sided . This dice is eight- sided .
-willed	Strong-willed daughter	My daughter sure is strong-willed .

Table 5.3.8.1i: Common End-term Present-participle and Gerund Compound-modifier Adjectives

Present Participle	Examples	Not Following the Noun
-bearing	child- bearing hips load- bearing walls	These hips are child- bearing . Don't remove walls that are load bearing .
-ending	never- ending happiness	I hope your happiness is never ending .
-jerking	Tear- jerking performance	The performance was tear- jerking .
-making	decision- making process	I'm good at decision making .
-sharing	profit- sharing plan	Profit sharing is a strong incentive.
-solving	problem- solving skills	My best skill is problem solving .
-sounding	Odd- sounding name	Their names are all odd sounding .
-speaking	English- speaking world French- speaking politician	Those areas are English- speaking .
-talking	Smooth- talking sales rep	He was fairly smooth- talking .
-wrenching	Gut- wrenching scene	The scene was so gut- wrenching .

Table 5.3.8.1j: Common End-term Preposition Compound-modifier Adjectives

Preposition	Examples	Not Following the Noun
-after	sought- after jobs	These jobs are highly sought- after .
-by	drive- by shooting	Last night's shooting was a drive- by .
-down	Trickle- down economics	That wealth didn't quite trickle down .
-out	All- out war	The war went all-out after a year.
-up	made- up names built- up neighbourhood	Those names sound so made up . The area is more built up now.

Table 5.3.8.1k: Common Number + Time-period Compound Modifiers

Duration	Examples	Not Following the Noun
-day	Five- day trial period	The trial period lasts five days .
-hour	Eleventh- hour bid	The bid came in the eleventh hour .
-minute	25- minute presentation	The presentation lasted 25 minutes .
-month	Ten- month term	The term ends after ten months .
-second	Nine- second sprint	He finished in under ten seconds .
-week	32- week co-op term	The co-op term is 32 weeks .
-year	Four- year degree program	An applied degree takes four years .

The second second-rate actor	the director wanted the second actor to be second rate
The film's 15-week run shattered box-office records	The film shattered box-office records with its run of 15 weeks
Two-way street	that street goes two ways
After-tax income	Our income after taxes is laughable.
Duty-free goods	
First-come-first-served basis	
Garbage-filled streets	
Gut-wrenching scene	
Large-scale development	
Many-sided issue	
Mountain-climbing enthusiast	
Odd-sounding name	
One-trick pony	This pony has only one trick
one-sentence paragraph	That paragraph only has one sentence.
Out-of-province funding	We went out of province for our funding.
Pay-as-you-go plan	We selected a plan that would have us pay as we go.
Quick-witted lady	
Short-handed goal	
Smooth-talking salesman	
Snow-capped mountains	
Soon-to-be graduate	
Strong-willed grandma	
Two-faced charlatan	
Tax-exempt services	
Tear-jerking performance	
Time-consuming activity	
Trickle-down economics	Claiming that wealth will trickle down is irresponsible.
User-friendly design	
Would-be writer	

But some have become one word, like handwritten and handmade, standalone

Compound adjectival Numbers

Two-thirds majority	two thirds of the respondents
Two-year-old child	the child is two years old
I've got ninety-nine problems, and grammar ain't one.	Pass the puck to number ninety-nine.

Suspended Hyphens

The 12- and 13-year-old kids	the kids are 12 and 13 years old
The well-known and -loved song	the song became well known and loved
How to treat first-, second-, and third-degree burns	the burns were first, second, and third degree
Funding for medium- to large-scale businesses	
Scores in the six- to seven-point range	

Prefixes

- Big hair in the mid-1980s
- Populism results in new accusations of anti-Americanism (because “America” is capitalized)
- My ex-girlfriend and I haven't spoken in a decade
- I re-wrote the essay
- e-mail
- **Not with adverbs ending in *-ly***

Compound Nouns

Again, anything starting with “self-” (e.g., self-starter, self-esteem, self-care), “great-” (e.g., great-grandmother, great-uncle), or ending with “-in-law” (e.g., mother-in-law, sister-in-law) and numbers above 20 (twenty-one, forty-three). If someone said that you have poor people skills, does that mean you have skill in dealing with poor people? By hyphenating “people-skills,” they make it clear that you could be better at dealing with people in general.

Table 5.3.8.2a: Common Compound Units of Measurement

Unit	Examples	Not Following a Noun
-hours	Kilowatt- hours Work- hours	I've racked up a few kilowatt-hours this winter. This project should take about 20 work-hours .
-miles	air- miles	Do you collect air-miles ?
-year	light- year	The next star is about _ light-years away.

Table 5.3.8.2b: Common Prefixes Making Compound Nouns

Prefix	Examples	Not Following a Noun
all-	all -inclusive resort all -powerful tech giant all -out offensive	Let's just go to an all-inclusive . Google's dominance has made it all-powerful . We sent everyone so our offensive was all-out .
ex-	ex -girlfriend ex -parrot ex -premier Harcourt	I haven't talked to my ex -girlfriend in ten years. That bird is dead. It is an ex -parrot. The ex -premier will be meeting with us today.
self-	self -control self -loathing	I'm exercising some self-control here. I follow up my dessert with a little self-loathing

Table 5.3.8.2c: Common Three- or Four-term Compound Nouns

Compound Noun	Plural
forget-me- not	forget-me- nots
Jack -of-all-trades	Jacks -of-all-trades
mother -in-law father -in-law	mothers -in-law fathers -in-law
Ne'er-do- well	Ne'er-do- wells
Stick -in-the-mud	sticks -in-the-mud
Writer -in-residence	writers -in-residence

Box-office	box-offices
Fixer-upper	fixer-uppers
Great-grandfather	Great-grandfathers
Court-martial	courts-martial
Vice-president	vice-presidents
Tractor-trailer	tractor-trailers
Cabinet-maker	cabinet-makers
Singer-songwriter	singer-songwriters
City-state	city-states
A has-been	has-beens
Sing-along	sing-alongs

Some words have become one word like headache, checkout, chequebook, uproar, downpour, input, sunrise, clearinghouse, bookkeeper, housekeeper, sightseeing, shipbuilding, cabinetmaker, blackboard, redhead, workplace, and even email

<https://www.capstoneediting.com.au/blog/how-to-hyphenate-a-compound-noun>

Compound Verbs

Usually pairing a noun with a verb, but some are now combined into one word.

With hyphens	One-word compounds	Two words (verb + preposition)
to air-condition		
to baby-sit		
to colour-code		
to copy-edit	to downgrade	
to double-check	to ghostwrite	
to double-click	to handpick	
to dry-clean	to handwrite	
to Google-search	to multitask	To check out
to hand-wash	to proofread	To log in
to ice-skate	to shortchange	To step up
to proof-edit	to troubleshoot	
to reverse-engineer	to waterproof	
to second-guess	to whitewash	
to spot-check		
to test-drive		
to window-shop		

Source: Grammar Usage – Compound Verbs (Jamieson, 2010)

For more on hyphens, see the following resources:

- *Guide to Grammar and Writing's* Hyphens page and digital-activity punctuation exercises linked at the bottom (Darling, 2014j)
- *Purdue OWL's* Hyphen Use (Conrey & Stolley, 2013)
- *The Punctuation Guide's* Hyphens page (Penn, 2011g)
- *The Grammar Book's* Hyphens page and its Hyphens Quiz 1 and Hyphens Quiz 2 at the bottom of the page (Straus, 2007b)

Return to the Complete List of Punctuation Covered in This Chapter Section

5.3.9: Long Dashes

For more on long dashes, see the following resources:

- *Guide to Grammar and Writing's* Dashes page and digital-activity punctuation exercises linked at the bottom (Darling, 2014k)
- *Purdue OWL's* Punctuation—Hyphens and Dashes page (Cimasko, 2013)
- *The Punctuation Guide's* Hyphen and Dashes page (Penn, 2011h)
- *The Grammar Book's* Dashes page (Straus, 2018b)

Return to the Complete List of Punctuation Covered in This Chapter Section

5.3.10: Question Marks

Question marks obviously follow questions. However, if the question is a polite request for action rather than one where a Yes or No answer is expected—i.e., a rhetorical question—end the sentence with a period rather than a question mark (Jamieson, 2014).

For more on long dashes, see the following resources:

- *Guide to Grammar and Writing's* Question Marks page (Darling, 2014l)
- *The Punctuation Guide's* Question Mark page (Penn, 2012)
- *The Grammar Book's* Question Marks page and its Question Marks, Quotation Marks, and Parentheses Quiz 1 and Question Marks, Quotation Marks, and Parentheses Quiz 2 linked at the bottom (Straus, 2014d)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.11: Exclamation Marks

For more on exclamation marks, which should be used sparingly, see the following resources:

- *Guide to Grammar and Writing's* Exclamation Marks page (Darling, 2014m)
- *The Punctuation Guide's* Exclamation Point page (Penn, 2011i)
- *The Grammar Book's* Exclamation Points page (Straus, 2015b)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.12: Periods

For more on periods, see the following resources:

- *Guide to Grammar and Writing's* Periods page and digital-activity punctuation exercises linked at the bottom (Darling, 2014n)
- *The Punctuation Guide's* Period page (Penn, 2011h)
- *The Grammar Book's* Periods page (Straus, 2014e)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Key Takeaway



Near the end of the editing stage, proofread for punctuation errors, such as comma and apostrophe misplacement, that would confuse your reader and embarrass yourself.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the punctuation rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the punctuation errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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5.4: PROOFREADING FOR SPELLING

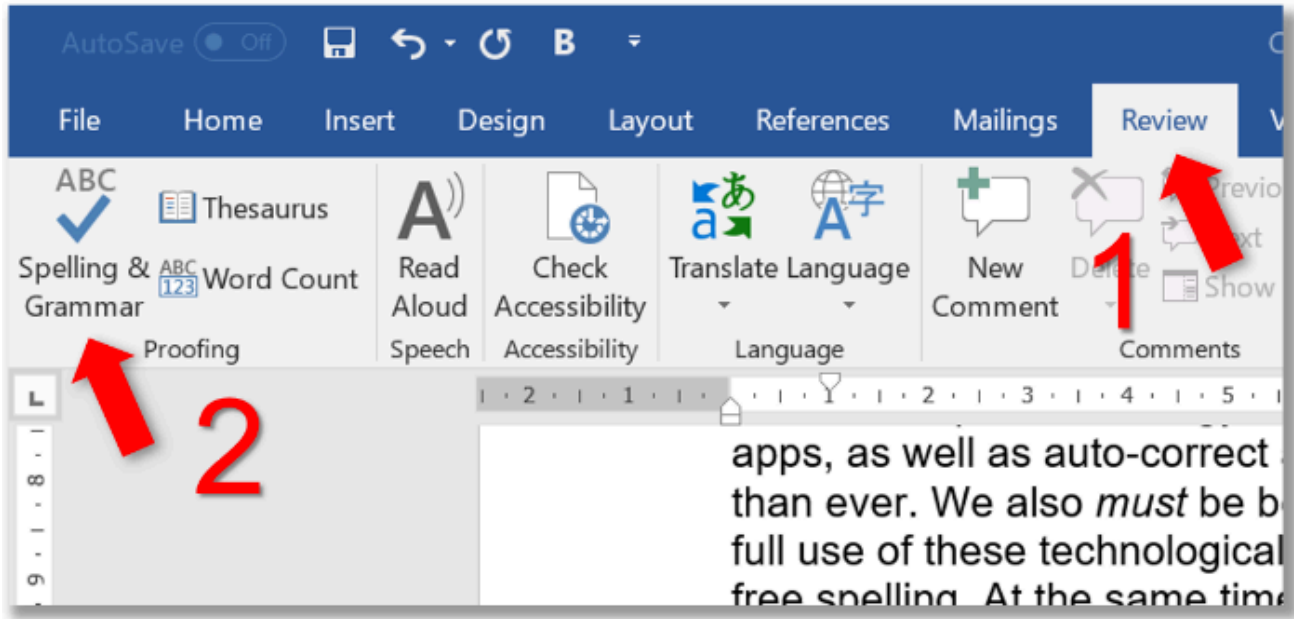
Learning Objectives



1. Identify and correct spelling errors in draft documents.
2. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

With the help of technology such as spellcheck features in Microsoft Word and online apps, as well as auto-correct and -complete on mobile devices, we can be better spellers than ever. We also *must* be better spellers than ever because, assuming we're making full use of these technological aides, audience expectations demand impeccable, error-free spelling. At the same time, the secondary school system has for decades relaxed its teaching of writing basics such that many students enter the post-secondary system lacking basic writing skills ("University Students Can't Spell," 2010). Between high school and the professional world, college students must not only quickly learn these basics, such as not confusing its and it's, but must also develop the attitude that such details matter.

Using technology close at hand to improve your spelling is crucial to helping you get there. Follow the procedure in §5.1.4.8 above (and shown in Figure 5.1.4.8; click on the thumbnail above-right to return to it) to set up your spellchecker in Microsoft Word so that it identifies errors as you go. Though it's a good idea to draft quickly and leave the pace-killing attention to detail for the editing stage (see §4.3 above), you can look up spellings for words that you struggle with as you go by just highlighting them, going to the Review tool ribbon, and clicking on the Spelling & Grammar tool at the far left (or alt + R, S). The feature will activate to suggest the correct spelling of just that word. Always also run a spellcheck sweep of your entire document by scrolling up to the top of your document and, without anything highlighted, following the same procedure to activate the spellchecker to examine each error and the tool's suggested corrections before you finalize your document for submission.



What about spellchecking when writing outside of your word processor such as in an email? For this you must ensure that your internet browser spellchecker is on and properly set up. In Google Chrome, for instance, you would just:

1. Click on the Settings icon (three stacked periods at the top right).
2. Click on the **Settings** option from the drop-down menu
3. Scroll down and click on **Advanced Settings**.
4. Scroll down to the **Languages** section and click on the **Spell check** to expand the control panel.
5. Click on **English (Canada)** to toggle on the feature so it turns blue. You will see there that you can also add custom words.

With the spellchecker turned out, your browser will identify misspelled words with by red-underlining them. If you have any additional difficulties, you can also move text to your word processor, use its more advanced spellchecker and editing features, then copy and paste your draft back into the email.

As good as the spellcheckers can be if you set them up properly, you must also know what to look for on your own so that you know what to approve when the spellchecker suggests edits. We'll divide this self-editing skill into two of the biggest challenges to spellcheckers:

- 5.4.1: Spelling Names
- 5.4.2: Spelling Homophones

5.4.1: Spelling Names

How do you feel when someone misspells your name? If you're like most people, you feel a little insulted, especially if the offending person had easy access to the correct spelling. Spelling people's names correctly is not only an essential principle of netiquette, but also key to maintaining your credibility in correspondence. If you're addressing a hiring manager in the cover letter to a job application, for instance, and her first name happens to be one of the 155 unique spelling variants of the name Caitlin (Burch, 2001), your livelihood depends on spelling her name just as she does herself. Otherwise, your lack of attention to detail becomes an invitation for her to deposit your application directly in the shredder.

Be especially vigilant with names during the proofreading stage of the writing process and use technology to help. With naming trends in the last couple of decades tending towards unique spellings both for people and products, spellcheckers may be of little help at first. Your best bet is to carefully confirm the name of the person in question by finding multiple sources that confirm their name (e.g., documents at hand, as well as their LinkedIn profile online), or the name of the product by consulting the company website, and add it to your spellchecker. When your spellchecker is doing an active sweep and grapples with the unfamiliar name, click on the "Add to Dictionary" option. That way, you can teach your spellchecker to be vigilant for you.

5.4.2: Spelling Homophones

Many spelling errors involve **homophones**, words that sound the same in speech but are spelled and used differently in writing. When you mean *there* but write *their* or *they're* in your draft, a sophisticated grammar and spellchecker will mark it as an error because it's incorrect in the context of the words around it despite being spelled correctly on its own. Just in case your checker is fooled by it, however, familiarizing yourself with the most common homophone-driven spelling errors is wise. Ensure at the proofreading stage that your writing hasn't fallen into any of these traps.

Table 5.4.2: Common Homophone Misspellings

Misspelling	Correct Spelling	When You Mean to Say
ad	add	to put together
add	ad	advertisement
advice	advise	to guide (verb)
advise	advice	guidance (noun)
air	heir	successor
already	all ready	everyone is ready
all ready	already	previous
altar	alter	change
alter	altar	church object
ant	aunt	mother's sister
are	our	belongs to us
aunt	ant	insect
bare	bear	animal
bear	bare	naked
beat	beet	vegetable
beet	beat	assault
been	bin	box
bin	been	past participle of <i>to be</i>
cite	sight / site	vision / place
complement	compliment	flatter
compliment	complement	matches or pairs well
could of	could have	maybe
council	counsel	advise
counsel	council	decision-making group
cue	queue	lineup
dear	deer	animal
deer	dear	greetings
defiantly	definitely	for sure
desert	dessert	after-dinner treat
dessert	desert	leave

ensure	insure	take out insurance
fair	fare	cost of transportation
fare	fair	honest / light / carnival
hear	here	this place
heir	air	oxygen
here	hear	listen
hole	whole	entire
holy	wholly	entirely
hour	our	belongs to us
insure	ensure	make sure
its	it's	it is
it's	its	belonging to it
knew	new	just arrived
lead	led	guided
led	lead	in front / heavy metal
mail	male	man
male	mail	letter sent by post
manner	manor	mansion
manor	manner	way
missed	mist	fog
mist	missed	didn't get it
new	knew	knowledge of
our	hour / are	60 minutes / form of <i>to be</i>
pair	pare / pear	peel / fruit
pare	pair / pear	couple / fruit
peace	piece	part
pear	pair / pare	couple / peel
piece	peace	calm
plane	plain	simple
plain	plane	flat surface, airplane
principal	principle	rule, concept

principle	principal	main, one in authority
queue	cue	prompt
sail	sale	being sold
sale	sail	wind-catching boat sheet
seam	seem	appear to be
seem	seam	joining line in a garment
should of	should have	ought to
sight	cite / site	credit a source / place
site	cite / sight	credit a source / vision
steal	steel	metal
steel	steal	rob
storey	story	tale
story	storey	floor of a building
tail	tale	story
tale	tail	animal appendage
their	there / they're	that place / they are
there	their / they're	belongs to them / they are
they're	their / there	belongs to them / that place
through	threw	tossed
threw	through	passed
to	too / two	also / 2
toe	tow	drag
too	to / two	toward / 2
tow (the line)	toe (the line)	foot digit (conform)
two	to / too	toward / also
ware	wear / where	put on clothes / what place
weather	whether	if
weak	week	7 days
wear	ware / where	pottery / what place
week	weak	not strong
whether	weather	climate

where	wear / ware	put on clothes / pottery
whole	hole	opening
wholly	holy	sacred
whose	who's	who is
who's	whose	belongs to who
would of	would have	didn't get to do
your	you're	you are
you're	your	belongs to you

For more on this topic, see Homophones (Singularis, 2013).

Key Takeaway



Near the end of the editing stage, proofread for spelling errors with a combination of a spellchecker and your own editorial vigilance, looking especially for problems with homophones, as well as people's and products' names.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the punctuation rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the punctuation errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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5.5: PROOFREADING FOR MECHANICS

Learning Objectives



1. Identify and correct spelling errors in draft documents.
2. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

The very last target for proofreading as you finalize your draft for submission is mechanics. In English writing, **mechanics** relates to typographic style such as the choice between UPPERCASE and lowercase letters, *italics* or **boldface** type and plain style, as well as using figures (e.g., 1, 2, 3) or written out numbers (e.g., *one*, *two*, *three*). Professionals follow stylistic conventions for mechanics much like they do punctuation rules. If you don't know these conventions, making them up as you go along may produce unprofessional-looking documents. Consider the following as your guide for how to get your writing mechanics right.

- 5.5.1: Capitalizing
- 5.5.2: Italicizing, Underlining, and Bolding
- 5.5.3: Numbering

5.5.1: Capitalizing

One of the worst mistakes you can make in a high-priority document like a cover letter is a glaring capitalization error such as not capitalizing the first letter in a sentence or writing “im” or “ive” instead of “I am” or “I have.” These errors are fine when texting your friends. To a hiring manager, however, the red flags they raise concerning the literacy, work ethic, and even maturity of the applicant might land that application in the shredder. At the other typographic extreme, those who use all-caps for anything other than abbreviations, as in “SEND ME THAT REPORT RIGHT NOW,” look emotionally unstable. In normal writing, we use

conventional combinations of capitals and lowercase letters meaningfully to guide our readers through our sentences. Let's take a closer look at when to capitalize and when not to capitalize letters.

- 5.5.1.1: What to Capitalize
- 5.5.1.2: What Not to Capitalize
- 5.5.1.3: Abbreviations

5.5.1.1: What to Capitalize

You can't go wrong if you capitalize in the following situations:

- First letter of the first word of a:
 - Sentence; e.g. *These pretzels are making me thirsty.*
 - Full-sentence quotation even if it appears after a signal phrase; e.g., *A great American humourist put it best when he said, "Travel is fatal to prejudice, bigotry, and narrow-mindedness" (Twain, 1869, p. 333).*
 - Rule following a colon in a sentence; e.g., *My mother taught me the golden rule: Treat others the way you'd like to be treated yourself*
 - **P**oint in a bullet-point or numbered list regardless of whether it's a full sentence or just a noun phrase, as in this list
- The first-person personal pronoun **"I"**
- Major words in **titles**, including the first letter of the first word no matter what it is, nouns, pronouns, verbs, adjectives, and adverbs, but not short prepositions such as *in*, *of*, *on*, or *to*, nor coordinating conjunctions such as *and*, *but*, *for*, or *so*, unless they're the first word (see Table 5.5.2.1 below for several example titles)
- The first letter of proper nouns, which include the types given below in Table 5.5.1

Table 5.5.1.1: Proper Nouns

Proper Noun Type	Examples
People and professional roles or familial relations preceding the name	Prime Minister Justin Trudeau, Roberta Bondar, Professor Patrick Grant, Mayor Humdinger, Ludwig van Beethoven, Aunt Pam, God, Buddha
Adjectives derived from names	Shakespearean sonnet, Freudian slip
Major buildings and infrastructure	CN Tower, the Queensway, the Hoover Dam
Specific geographical locations and regions	Ottawa, British Columbia, the Canadian Rockies, Lake Ontario, the West Coast, Eastern Canada, the Maritimes, South Asia, the Netherlands
Celestial bodies	Venus, Earth, Mars, the Sun, the Kuiper Belt, the Milky Way, the Virgo Supercluster
Books, films, etc. (see Table 5.5.2.1 below)	<i>Beautiful Losers, Star Wars, The Onion, Overwatch, the Ottawa Citizen</i>
Days of the week, months, holidays	Monday, November, Labour Day, Groundhog Day, Ramadan, Hanukkah, Fall 2019 semester
Historical events and periods	the Battle of Vimy Ridge, the Cold War, the Renaissance, the Old Kingdom, Anthropocene, the Big Bang
Ethnicities, nationalities, religions, and languages	Anishinaabe, Australian, English, Russian, Malaysian, Catholic, Islam, Sunni Muslim, Swedish, Swahili
Institutions, political and cultural groups	Algonquin College, University of Toronto, the Supreme Court, New Democrats, Montreal Canadiens, Oscar Peterson Trio
Academic courses, programs, departments, and some degrees	Statistics 101, Communications I, Game Development Advanced Diploma Program, School of Business, PhD, MBA
Numbered or lettered items	Flight AC2403, Gate 11, Invoice No. 3492B, Serial No. D8834-2946-1212, Rural Road 34, Figure 8, Volume 2, Part 4, Model 3
Brand names, corporations, and stores	Microsoft Word, Samsung Galaxy, Tesla, Apple, Google, GlaxoSmithKline, Mountain Equipment Co-op

5.5.1.2: What Not to Capitalize

Don't capitalize the following:

- Directions if they're not in a geographical name; e.g., *We drove **east** to North Bay, Ontario, from the Pacific Northwest*
- Professional roles on their own without a name following (e.g. *the prime minister*) or if they follow the person's name; e.g., *Patrick Grant, professor of English*

- Celestial bodies when used outside of the context of celestial bodies; e.g., *He's really down to earth. I love you to the moon and back. Here comes the sun.*
- The seasons, despite the fact that the days of the week and months are capitalized (e.g., *We're heading south for the winter.*) unless they're part of a title (e.g., *Fall 2019 semester*)
- Century numbers; e.g., *the nineteenth century*
- Words that came from names or geographical regions; e.g., *pasteurize, french fries, italics, roman numerals, arabic numerals*
- Fields of study; e.g., *history, biology, physics, economics, dentistry*
- Some academic degrees; e.g., *master's degree, bachelor's degree*
- Citations at the page and line level: *page 6, lines 23-27; p. 24, ll. 12-14*

What to Look for When Proofreading

Pay close attention to the beginning of sentences, each point in a list, titles, and proper nouns. Determine whether you should capitalize or leave letters lowercase depending on the conventions given above.

Incorrect: *let's go South to visit the President and stay with vice president Frito.*

The fix: *Let's go south to visit the president and stay with Vice President Frito.*

The fix: *Let's go south to visit President Comacho and stay with Frito, his vice president.*

In the drafting process, you might delete the original capitalized opening to a sentence while trying out another style of sentence and forget to capitalize the new beginning. The proofreading stage is when you can catch glaring errors such as this. Also, the convention for geography is to capitalize directions only if they're part of place names but not when they're mere compass directions. Finally, capitalize professional titles only when they precede a name.

Incorrect: *In addition, im proficient in the use of Microsoft office, such as Powerpoint.*

The fix: *In addition, I am proficient in the use of Microsoft Office, such as PowerPoint.*

Texting habits might die hard. A crucial step in professionalizing yourself, however, is to correct informal spellings such as *im* so that they are the more correct *I'm* or more formal *I am*, especially in job application documents. Also, be especially careful with capitalization around proprietary names such as software, which may include internal capitalization as we see in *PowerPoint* or *YouTube*.

Incorrect: *I had to read the textbook Communication At Work for my Algonquin college communications course in the accounting program.*

The fix: *I had to read the textbook Communication at Work for my Algonquin College Communications course in the Accounting program.*

The titling convention is to capitalize major words but not short prepositions such as *at*. Since academic courses, institutions, and programs are proper nouns like the names of people, capitalize them all.

5.5.1.3: Abbreviations

Fully spell out abbreviations the first time you mention them and put the abbreviation in parentheses. For example, if you were to say, “The Public Health Agency of Canada (PHAC) is reporting an above-average number of flu deaths this year,” subsequent mentions of the Agency can appear as simply “PHAC.” Institutions that are so common as names (proper nouns) in their abbreviated form (e.g., CBC, which stands for the “Canadian Broadcasting Corporation”) can be given as abbreviations unless introduced to an audience that wouldn’t know them. As you can see here, avoid adding periods after each uppercase letter in an abbreviation.

For more on capitalization, see the following resources:

- The *Guide to Grammar & Writing’s* Capitalization page and Capitalization I and Capitalization II digital-activity exercises linked at the bottom (Darling, 2014a)
- The *Guide to Grammar & Writing’s* Abbreviations page and *Guide to Grammar & Writing’s* Abbreviations I digital-activity exercise linked at the bottom (Darling, 2014b)
- *Purdue OWL’s* A Little Help with Capitals page (Berry & Brizee, 2013)
- *The Grammar Book’s* Capitalization Rules page (Straus, 2014)

5.5.2: Italicizing, Underlining, and Bolding

The standard typeface options of *italics*, **bold**, and underline allow writers to draw attention to their text in varying degrees. Each has its advantages and disadvantages. The biggest disadvantage comes from overuse, which diminishes their impact. Taking advantage of their ability to draw the reader’s eye and communicate information beyond the words they express requires following certain conventional uses for each. We’ll start with the most meaningful in terms of the information it can convey.

As the typeface option that slants the top of each letter to the right, **italic typeface** performs several possible functions related to emphasizing words. Italics can also resolve ambiguities that would cause confusion without it. Use italics for the following purposes:

- **Emphasis:** Use italics sparingly to emphasize particular words or phrases; e.g., “I’ve asked them no less than *three times* to send the reimbursement cheque.” If we were saying this aloud, you would raise your volume and slow down your enunciation to emphasize “*three times*.” Italicizing is more mature and professionally appropriate than using all-caps to emphasize words.
- **Words under Discussion:** Italicize a word, phrase, or even a full sentence when discussing it. For instance, you see throughout this textbook example words italicized, such as just above §5.5.1.1.
- **Foreign Words and Phrases:** Italicize foreign words that have not yet become part of the English

vernacular. For instance, italicize the binomial Latin name of a species (e.g., *branta canadensis* for Canada goose) or the French phrase *déjà vu* but not the more familiar borrowed French words “bourgeois,” “brunette,” “chauffeur,” “cliché,” “depot,” “entrepreneur,” “résumé,” or “souvenir.” If the foreign word is in most English dictionaries, it is probably safe to write it in plain style rather than italics.

- **Titles:** Use italics when referring to the title of a longer work such as a book, film, or newspaper. See Table 5.5.2.1 below for a full list of the types of works you would italicize, as opposed to shorter works (or titled sections within longer works) you would put in quotation marks without italics.

Table 5.5.2.1: Italicized Titles

Type of Work	Examples
Book, legislation	<i>Elements of Style, A Brief History of Time, The Handmaid’s Tale, The Great Gatsby, The Copyright Act</i>
Magazine	<i>Maclean’s, The Walrus, Chatelaine, MoneySense, Canadian Business, The Hockey News, Today’s Parent, Flare</i>
Newspaper	<i>The Globe and Mail, the Toronto Star, National Post, Montreal Gazette, Ottawa Citizen, Time Colonist</i>
Website (APA)	<i>You Tube, Wikipedia, Facebook, Instagram, The Onion</i>
Film	<i>Casablanca, Thirty Two Short Films About Glenn Gould</i>
TV show	<i>Dragons’ Den, Hockey Night in Canada, Orphan Black</i>
Play, long poem	<i>The Rez Sisters, Romeo & Juliet, Waiting for Godot, Paradise Lost</i>
Album, opera	<i>Drake’s Views, Arcade Fire’s Funeral, Alanis Morissette’s Jagged Little Pill, Mozart’s The Magic Flute</i>
Works of art	<i>Mona Lisa, The School of Athens, The Starry Night, Voice of Fire</i>
Video game	<i>Tetris, Grand Theft Auto V, Super Mario Bros., Minecraft</i>
Ships, airplanes	<i>the Titanic, Bismarck, Hindenburg, Enola Gay</i>
Legal cases	<i>Roe v. Wade, Brown v. Board of Education, Baker v. Canada</i>

When words are already italicized, such as a sentence under discussion or a book title within a book title, then de-italicize the title back into plain style (e.g., *Vision in Shakespeare’s King Lear*). Exceptions to the rule of italicizing books are holy texts such as the Bible and Koran, though specific editions should be italicized (e.g., *The New American Standard Bible*).

Underlining is normally an old-fashioned alternative to italicizing because it identified titles written on typewriters before modern word processors made italicization feasible. Today, underlining is mainly used to emphasize words within italicized titles or as an alternative to boldface type.

More than any other typeface, **bold** is best at emphasizing words because it draws the reader’s eyes more

effectively than italics or underlining, especially for document titles and section headings. In casual emails, you can also use it to highlight a main action point that's surrounded by plain-style text to ensure that the reader doesn't miss it. Avoid bolding, underlining, italicizing, and using all-caps in combination merely to lend added emphasis to words. Use whichever one is most appropriate in context.

For more on italics, underlining, and bolding, see the following resources:

- Your Dictionary's When to Italicize (2009)
- WikiHow's How to Use Italics (Morgan, 2015)
- Butterick's Practical Typography's Bold or Italic (Butterick, 2013)

5.5.3: Numbering

When do you spell out a number (e.g., *ten*) and when do you use a figure (e.g., *10*)? What are the conventions for academic and professional situations? It depends on your purposes, but in routine formal situations and in APA style, spell out numbers from one to ten and use figures for 11 and up. In MLA, spell out any number if it's only a word or two, but use figures for numbers that require three or more words (Becker, 2014). In informal and technical writing, however, using only figures ensures accuracy, consistency, and brevity. Let's look at the formal APA conventions in more detail in Table 5.4.3.

Table 5.5.3: Formal Numbering Conventions

Convention	Examples
Words	only one person, ten reasons
Figures	11 people, 40 cars, 127 hours, 330 lbs. \$39.99 , 6.12 litres, 68,000 voters, 186,282.397 miles per second.
Large round	a hundred people, a thousand times, six billion dollars, \$6 billion , \$6,300,000 , \$6.3 million , \$2.345 trillion , You have a hundred trillion microbes in your body.
Fractions	over two thirds of respondents, 4 millionths of a second, a one-fifth share of the profit, 3/32 allen key, 1 and 21/64 inches
Percentages and decimals	8 percent increase (<i>in formal docs</i>), 8% increase (<i>in business forms and technical docs</i>), 9.57 seconds, .045 cm, 0.12 g
Beginning of sentences	Twenty-six percent of respondents agreed while 71% disagreed.
Days, years	July 1, 1867 ; from the 1st of July to the 4th ; AD 1492 ; from 2000 to 2018 ; in the 2010-2011 season; the nineties , 1990s , '90s
Times	8am , noon, 1:15pm , 5-6pm , 10:30-11am , 11:30am-1pm (or ...PM)
Addresses	One First Street, 2 Second Street, 16 Tenth Avenue, 251 11th Avenue W, 623 East 125th Street
Telephone	613-555-4450 ext. 9832, 250.555.7204, (416) 555-1185
Identification	Room 6 , Channel 4 , Hwy. 416 , Elizabeth II , Henry V Andre weighed over 200 lbs. by age 12 and over 500 lbs. by 40.
Weights and measures	The room is 10' by 12' in a 2,400 sq. ft. house., 8 metres (<i>in formal docs</i>), 24km (<i>in informal and technical docs</i>) Little Nicky was 3 years and 7 months when his family moved.
Ages	By the time she was thirty-six , Miranda had accomplished plenty. Miranda, 36 , has accomplished plenty.
Pages	page 24 / (p. 24), pages 67-68 / (pp. 67-68), (pp. 114-118), chapter 11 / (ch. 11), chapters 11-12 (chs. 11-12)
Commercial and legal	The stated amount of \$1,200 will be paid no less than two (2) weeks after the completion of the contact work.
Related (all under 10)	We bought six shirts, eight pairs of pants, and four jackets.
Related (any 10+)	We bought 9 apples, 18 bananas, and 6 pineapples.
Consecutive	They ordered twelve 90-lb. weights. We observed twenty-five 500-megaton explosions. I manufactured 14,032 6709T parts for Dynamo, Inc. (<i>When two numbers appear consecutively, generally write out the number for the first and use a figure for the second, but use a figure for the first if it would take more than one or two words to write it out.</i>)

What to Look for When Proofreading

Determine whether you should replace your spelled-out numbers with figures or vice versa according to the conventions given above.

Incorrect: *Only 2 people showed up.*

The fix: *Only **two** people showed up.*

In formal writing, spell out one- or two-word numbers rather than use figures lazily. However, feel free to use figures, no matter how small the number, in informal writing where concision matters most.

Incorrect: *She was charged **nine-hundred-and-thirty-six dollars and ninety-eight cents** for the repair.*

The fix: *She was charged **\$936.98** for the repair.*

Incorrect: *The chances of life existing on other planets are quite high if there are, by extrapolation, roughly **19,000,000,000,000,000,000,000,000** star systems with earth-like planets in the universe (Frost, 2017).*

The fix: *The chances of life existing on other planets are quite high if there are, by extrapolation, roughly **19 billion trillion** star systems with earth-like planets in the universe (Frost, 2017).*

Incorrect: ***23,000** units were sold in the first quarter.*

Incorrect: ***Twenty-three thousand** units were sold in the first quarter.*

The fix: *In the first quarter, **23,000** units were sold.*

Though you should use a figure to represent a number above ten and spell out a number appearing at the beginning of a sentence, re-word the sentence if that number is more than two words.

Incorrect: *We've moved the meeting **to 05/04/18**.*

The fix: *We've moved the meeting **from Tuesday, April 2, to Friday, April 5, 2018**.*

The fix: *We've moved the meeting **from Tuesday the 2nd of April to Friday the 5th, 2018**.*

Though the above correction sacrifices brevity, the gains in clarity can potentially prevent expensive miscommunication. The correction prevents the message recipients from misinterpreting the new meeting date as being May 4th and helps them pinpoint which date in their calendars to click and drag the original meeting from. Providing the days of the week also helps the recipients determine at a glance whether the new date conflicts with regularly scheduled weekly appointments.

Incorrect: *Let's meet at **number ninety, 6th Avenue, at fourteen o'clock**.*

The fix: *Let's meet at **90 Sixth Avenue at 2pm**.*

Though “ninety” would be correct in some contexts (MLA style) because it is a one-word number, APA address conventions require you to use figures for address numbers and to spell out numerical street/avenue numbers from first to tenth, then to use figures from 11th onward. Also, the English convention for representing time of day is to use the twelve-hour clock, whereas the French convention is to use the twenty-four-hour clock.

Incorrect: *Will you still need me, will you still feed me when I'm **64**?*

The fix: *Will you still need me, will you still feed me when I'm **sixty-four**?*

Unless the age follows a person's name as an appositive (e.g., *Paul, 64, is losing his hair*) or is part of a series that identifies several ages (e.g., *a program for those of 4 to 6 years of age, with some 7-year-olds*) or combines one person's age in years and months, spell out ages up to one hundred.

Incorrect: *The one expedition catalogued **thirty-four** new types of spiders, 662 new types of beetles, and 178 new types of ants.*

The fix: *The one expedition catalogued **34** new types of spiders, 662 new types of beetles, and 178 new types of ants.*

Though normally you would spell out two-word numbers, maintaining consistency with the related numbers in the series, which are figures here because they are over ten, takes precedence.

Incorrect: *The program has **2** streams, one for the **4**-year-olds and another for the **5**-year-olds.*

The fix: *The program has **two** streams, one for the **4**-year-olds and another for the **5**-year-olds.*

This looks at first as if all three of these are related numbers in a series and therefore must all be figures. The related-numbers convention applies to only the last two numbers (ages), however, whereas the first number is not an age, hence not part of the series. Since the first number can be spelled out as one word, *two*, it is not given as a figure.

Incorrect: *If your gym orders more than **20 100-lb.** weights, you'll get every additional unit for half price.*

The fix: *If your gym orders more than **twenty 100-lb.** weights, you'll get every additional unit for half price.*

To avoid "20 100-lb." being misread as "20100-lb.," bend the rule about using figures for numbers above ten to spell out the first of the consecutive numbers and use a figure for the second since it's a weight. (If the first number were more than two words spelled out and the weight only one, however, "150 thirty-pound weights" would be preferable.)

For more on numbers, see the following resources:

- Purdue OWL's Writing Numbers (Berry, 2018)
- APA Style's Comparing MLA and APA: Numbers (Becker, 2014)

Key Takeaway



At the end of the editing stage, proofread for mechanical errors involving capitalization, typographic style (e.g., italics), and numbers.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the punctuation rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the mechanical errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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PART III

UNIT 3: WORKPLACE COMMUNICATION



Common COMM Course Learning

Outcomes

This unit supports the following course learning outcomes (*COMM 3048, COMM 3073, COMM 3074, COMM 3075, COMM 3077, COMM 3080, COMM 3082*):

- **1. Compose** workplace documents including emails, letters, and a research report.
- **2. Analyze** an audience and tailor a message to that audience (objective/subjective writing, persuasive writing, internal/external audience).
- **4. Prepare** documents according to basic principles of formatting and visual communication in various written documents.

COMM 3020:

- **1. Communicate** clearly, concisely and correctly in the written, spoken and visual form that fulfills the purpose and meets the needs of the audience.
- **2. Respond** to written, spoken or visual messages in a manner that ensures effective communication.
- **3. Create** well-organized business documents (including emails, letters and reports).
- **4. Compose** stylistically appropriate business documents.
- **7. Synthesize** research sources in an APA-style, analytic report.

CHAPTER 6: ELECTRONIC WRITTEN COMMUNICATION

Jordan Smith

Chapter Learning Objectives

- Identify characteristics of effective professional emails.
- Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
- Select and use common, basic information technology tools to support communication.
- Discuss emerging netiquette standards in social media used for professional purposes.
- Use rapid electronic communication channels such as texting and instant messaging in a professional manner.

We begin our applied-writing unit with electronic channels because they are by far the most popular both for personal and business use. The fact that most students in college have grown up with these channels and now have years of experience using even the newest of them gives them the advantage of familiarity. With that comfort, however, may also come years of bad habits deeply rooted in the development of those skills for personal distraction and social ends. This chapter will attempt to provide those students a reset button to help professionalize those communication skills. Email deserves a close look because it is the most widespread and established of the electronic forms. Since so much of our lives are wrapped up in electronic interaction, reviewing the netiquette principles established at the outset of the electronic communications revolution can actually help us move forward as we look at the newest and fastest communication channels, texting and instant messaging.

- 6.1: Emailing
- 6.2: Netiquette and Social Media
- 6.3: Texting and Instant Messaging

6.1: EMAILING

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Identify characteristics of effective professional emails.

Electronic mail, widely known as “e-mail” or just “email,” is by volume the most popular written communication channel in the history of human civilization. With emails being so cheap and easy to send on desktop and laptop computers, as well as on mobile phones and tablets, a staggering 280 *billion* emails are sent globally per *day* (Radicati, 2017)—that’s over a hundred trillion per year. Most are for business purposes because email is such a flexible channel ideal for anything from short, routine information shares, requests, and responses the length of a text, to important formal messages delivering the content that letters and memos used to handle. Its ability to send a message to one person or as many people as you have addresses for, integrate with calendars for scheduling meetings and events, send document attachments, and send automatic replies makes it the most versatile communication channel in the workplace.

This mindboggling quantity of 3.2 million emails sent per second doesn’t necessarily mean that quality is a non-issue for email, however. Because it has, to some extent, replaced mailed letters for formal correspondence, emails related to important occasions such as applying for and maintaining employment must be impeccably well written. Your email represents you in your physical absence, as well as the company you work for if that’s the case, so it must be both *good* (well-written) and appropriate.

First, ensure that you really need an email to represent you because emailing merely to avoid speaking in person or calling by phone can do more harm than good (see §2.3, especially Table 2.3, above on channel selection). If an email is necessary, however, then it must be *good*. As people who make decisions about your livelihood, the employers and clients you email can be highly judgmental about the quality of your writing. To them it’s an indication of your professionalism, attention to detail, education, and even intelligence. The writing quality in a single important email can be the difference between getting hired and getting fired or remaining unemployed.

Let's say, for instance, that you get an email from a customer and they mention in it that they've been shopping around for a company to do a custom job for them. This means they're emailing other companies with the same inquiry. Let's say also that your competitors offer similar services at similar prices and are similarly reviewed positively online. Tough choice for the customer. With everything else being equal, the quality of the email responses may be the deciding factor. Responding to the customer quickly gives you an advantage because you show them that you can get things done promptly. If your email is also well written in a professional style (see §4.5.2 above for the 6 Cs) and error-free in every way due to effective editing and proofreading (see Ch. 5 above), you stand a much better chance of getting the job.

Comparing this with another company's email that came a few days later with multiple writing errors in it, the customer will likely go with the company that wrote the better email. Even though the quality of communication doesn't necessarily guarantee quality of work in the product or service a company provides, customers will assume a connection. Indeed, the quality of communication can certainly say volumes about work ethic and attention to detail.

The customer's basis for judgment here is that if a company's communications are good, it must be because they've hired a customer service rep dedicated to responding to people. This means they have the money to do so, which means they're successful, which must be because they do a good job, which means they'll do a good job on what the customer wants them to do. We must all try to make a similarly strong impression in any situation where the quality of email matters. Let's turn our attention, then, to the ten aspects you must take care of when sending an important email in the order they appear in the email from top to bottom.

Email Parts

- 6.1.1: Email Address
- 6.1.2: Timestamp & Punctuality
- 6.1.3: Subject Line Title
- 6.1.4: Opening Salutation & Recipient Selection
- 6.1.5: Message Opening
- 6.1.6: Message Body
- 6.1.7: Message Closing
- 6.1.8: Closing Salutation
- 6.1.9: E-signature
- 6.1.10: Attachments
- 6.1.11: Before Sending your Email

Before delving into this detail, however, let's review the advantages, disadvantages, and occasions for using email given earlier in Table 2.3 on channel selection.

Table 2.3 Excerpt: Email Pros, Cons, and Proper Use

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Delivers messages instantly anywhere in the world to anyone with an internet connection and email address you have • Sends to one or many people at once, including secondary audiences CC'd or BCC'd • Allows you to attach documents up to several megabytes in size or links to any internet webpages • Allows for a back-and-forth thread on the topic in the subject line • Archives written correspondence for review even decades later • Can be done on any mobile device with an internet connection • Is free (beyond your subscription fees to an internet or phone provider) • Is somewhat permanent in that emails exist somewhere on a server even if deleted by both sender and receiver 	<ul style="list-style-type: none"> • Gives the illusion of privacy: your messages can be forwarded to anyone, monitored by your company or an outside security agency, retrieved with a warrant, or hacked even if both you and receiver delete them • Can be slow when used for back-and-forth dialogue • Tone may be misread (e.g., jokes misunderstood) due to the absence of nonverbal cues • May be sent automatically to the recipient's spam folder or otherwise overlooked or deleted without being read given the volume of emails some people get in a day • Subject to errors such as hitting "send" prematurely or replying to all when only the sender should be replied to • Subject to limits on document attachment size • Subject to spam (unsolicited emails) • Regretted emails can't be taken back or edited • Requires a working internet connection on a computing device, which isn't available everywhere in the world 	<ul style="list-style-type: none"> • Reply within 24 hours, or sooner if company policy requires it • Follow conventions for writing a clear subject line; salutation; message opening, body, and closing; closing salutation, and e-signature • Netiquette: be as kind as you should be in person; don't write emails angrily • Edit to ensure coverage of the subject indicated in the subject line with no more or less information than the recipient needs to do their job • Proofread to ensure correct grammar, punctuation, and spelling because errors compromise your credibility • Avoid confusion due to vagueness that requires that the recipient respond asking for clarification 	<ul style="list-style-type: none"> • Quickly deliver a message that doesn't need an immediate response • Send a message and receive a response in writing as evidence for future review (lay down a paper trail) • Use when confidentiality isn't necessary • Send electronic documents as attachments • Send the same message to several people at once, including perhaps people whose email address you need to hide from the others (using BCC) to respect their confidentiality

6.1.1: Email Address

Just as with physical “snail mail” you pick out of your Canada Post mailbox, the first thing you see when an email arrives in your inbox is who it’s from. The address determines immediately how you feel about that email—whether excited, uninterested, curious, angry, hopeful, scared, or just obliged to read it. Your email address will create similar impressions on those you email depending on your relationship to them. It’s therefore important that you send from the right email address.

If you work for a company, obviously you must use your company email address for company business. Customers expect it. Bear in mind that in a legal and right-to-privacy sense, you don’t own these emails. If they exist on a company server, company administrators can read any of them if they are investigating a breach of company policy or criminal activity (Office of the Privacy Commissioner of Canada, 2010). This means that you must be careful not to write anything in an email that could compromise your employability.

If you’re writing on your own behalf for any business or job-application purposes, it’s vital that you have a respectable-looking email address. Using a college or university email is a good bet because it proves that you indeed are attending or attended a post-secondary institution when you’ve made that claim in your application. If your school email address has expired, however, it’s worth starting an account that has a straightforward address showing your name. If your name is Justin Trudeau, for instance, your ideal email address would simply be justin.trudeau@ with one of the major email providers like Gmail or Outlook/Hotmail. Of course, everybody knows that all of the straightforward firstname.lastname@ addresses have been taken, so there’s nothing wrong with variations that include middle names or initials and small numbers as long as they don’t get too big, such as more than 25 characters.

What’s fundamentally important, however, is that you retire your teenage joke email address. If you have one of these, it may have scored some points with friends back in high school, but now that you’re an adult, it will only do irreparable harm to your employability prospects if you’re using it for job applications. Any potential employer or other professional who gets an email from pornstar6969baby@whatever.com, speedball.playa@hotmail.com, or crazy.unicorn.girl@yahoo.com is going to delete it without even opening it.

Also, forget about clinging to the fantasy of having only one email address to deal with. Just as your demeanour and language style changes in social, family, and professional contexts, you must likewise hold multiple email accounts—one for work, one for school, and one for personal matters. Each of the 3.8 billion email users in the world has an average of 1.7 email accounts (Radicati, 2017). It’s likely that you will have more than three throughout your life and retire accounts as you move on from school and various workplaces. If you can manage it, you can set up forwarding so that you can run multiple accounts out of one, except where company or institutional policy requires that you work entirely within a designated email provider or client.

Return to the Email Parts menu

6.1.2: Timestamp & Punctuality

The timestamp that comes with each email means that punctuality matters and raises the question of what the expectations are for acceptable lag time between you receiving an email and returning an expected response. Of course, you can reply as soon as possible as you would when texting and have a back-and-forth recorded in a thread. What if you need more time, however?

Though common wisdom used to be that the business standard is to reply within 24 hours, the availability of email on the smartphones that almost everyone carries in their pockets has reduced that expectation to a few hours. Recent research shows that half of email responses in business environments in fact comes within two hours (Vanderkam, 2016). Some businesses have internal policies that demand even quicker responses because business moves fast. If you can get someone's business sooner than the competition because you reply sooner, then of course you're going to make every effort to reply right away. Of course, the actual work you do can get in the way of email, but you must prioritize incoming work in order to stay in business. After all, the early bird gets the worm.

What if you can't reply within the expected number of hours? The courteous course of action is to reply as soon as possible with a brief message saying that you'll be turning your attention to this matter as soon as you can. You don't have to go into detail about what's delaying you unless it's relevant to the topic at hand, but courtesy requires that you at least give a timeline for a fuller response and stick to it.

Return to the Email Parts menu

6.1.3: Subject Line Title

The next most important piece of information you see when scanning your inbox is the email's subject line. The busy professional who receives dozens of emails each day prioritizes their workload and response efforts based largely on the content of the subject lines appearing in their inbox. Because it acts as a title for the email, the subject line should accurately summarize its topic in 3-7 words.

The goldilocks wordcount range here is important because your subject line shouldn't be so vague that its one or two words will be misleading, nor so long and detailed that its eight-plus words will be cut off by your inbox layout. Though it must be specific to the email topic, details about specific times and places, for instance, should really be in the message itself rather than in the subject line (see Table 6.1.3 below). Also, avoid using words in your subject line that might make your email look like spam. A subject line such as *Hello* or *That thing we talked about* might appear to be a hook to get you to open an email that contains a malware virus. This may prompt the recipient to delete it to be on the safe side, or their email provider may automatically send it to the junkmail box, which people rarely check. It will be as good as gone, in any case.

Table 6.1.3: Subject Line Length

Too Short	Just Right	Too Long and Detailed
Problem	Problem with your product order	Problem with your order for an LG washer and dryer submitted on April 29 at 11:31pm
Meeting	Rescheduling Nov. 6 meeting	Rescheduling our 3pm November 6 meeting for 11am November 8
Parking Permits	Summer parking permit pickup	When to pick up your summer parking permits from security

Stylistically, notice that appropriately sized subject lines typically abbreviate where they can and avoid articles (*the, a, an*), capitalization beyond the first word (except for proper nouns; see Table 5.5.1), and excessive adjectives.

Whatever you do, don't leave your subject line blank! Even if you're just firing off a quick email to send an attachment to yourself and have no other words besides, the subject line text will be essential to your ability to retrieve that file down the road. Say you find yourself desperately needing that file months or even years later because the laptop it was saved on was stolen or damaged beyond repair, which you couldn't have predicted at the time you sent it. A search in your email provider for words matching those you used in the subject line will quickly narrow down the email in question. Without words in the subject line or message, however, you'll have no choice but to guess at when you sent the email and waste time going through page after page of sent-folder messages looking for it. A few seconds spent writing a good subject line can potentially save hours of frustrating searches.

Return to the Email Parts menu

6.1.4: Opening Salutation & Recipient Selection

When a reader opens your email, its opening salutation indicates not only who the message is for but also its level of formality. As you can see in Table 6.1.4 below, opening with *Dear [Full Name]* or *Greetings, [Full Name]*: strikes an appropriately respectful tone when writing to someone for the first time in a professional context. When greeting someone you've emailed before, *Hello, [First name]*: maintains a semiformal tone. When you're more casually addressing a familiar colleague, a simple *Hi [First name]*, is just fine.

Table 6.1.4: Opening Salutation Examples

First-time Formality	Ongoing Semiformal	Informal
Dear Ms. Melody Nelson:	<i>Hello, Melody:</i>	<i>Hi Mel,</i>
<i>Dear Ms. Nelson:</i>	<i>Hello again, Melody:</i>	<i>Hey Mel,</i>
<i>Greetings, Ms. Melody Nelson:</i>	<i>Thanks, Melody.</i> (in response to something given)	<i>Mel,</i>
<i>Greetings, Ms. Nelson:</i>		

Notice that the punctuation includes a comma after the greeting word and a colon after their name for formal and semiformal occasions following Comma Rule 2.1 and Colon Rule 1.2. Informal greetings, however, relax these rules by omitting the comma after the greeting word and replacing the colon with a comma. Don't play it both ways with two commas; *Hi, Jeremy,* appears too crowded with them.

Depending on the nature of the message, you can use alternative greeting possibilities. If you're thanking someone for information they've sent you, you can do so right away in the greeting; e.g., *Many thanks for the contact list, Maggie.* When your email exchange turns into a back-and-forth thread involving several emails, it's customary to drop the salutation altogether and treat each message as if it were a text message even in formal situations.

Formality also dictates whether you use the recipient's first name or full name in your salutation. If you're writing to someone you know well or responding to an email where the sender signed off at the bottom using their first name, they've given you the green light to address them by their first name in your response. If you're addressing someone formally for the first time, however, you may want to strike an appropriately respectful tone by using their full name. If you're addressing a group, a simple *Hello, all:* or *Hello, team:* will do.

Be careful when selecting recipients, however. First, spell their name correctly because email addresses often have non-standard combinations of name fragments and numbers; any typos will result in the server bouncing your email back to you as being unsent. Waiting before entering their name in the recipient or "To" field is also wise in case you accidentally hit the Send button before you're finished drafting your email. If you prematurely send an email, a quick follow-up apologizing for the confusion and the completed message is the best damage control you can do, but it requires immediate action. Another preventative measure is to compose a message offline, such as in an MS Word or simple Notepad document devoid of formatting, then copy and paste it into the email field when you're ready to send.

If you have a primary recipient in mind but want others to see it, you can include them in the CC (carbon copy) line. (If confidentiality requires that recipients shouldn't see one another's addresses, BCC [blind carbon copy] them instead.) Be selective with whom you CC, however. Yes, it's good to keep your manager in the loop, but you may want to do this only at the beginning and the end of a project's email "paper" trail. They will appreciate that things are under way and wrapping up but may get annoyed if their inbox is flooded with every little mundane back-and-forth throughout the process. If in doubt, speak with your manager about their preferences for being CC'd.

Never "reply all" so that everyone included in the "To" line and CC'd sees your reply unless your response

includes information that everyone absolutely must see. If your manager sends some information to all 80 people in your department, for instance, your reply-all response that just acknowledges receipt with an “OK, thanks!” which is unnecessary in the first place, will anger 79 people who expected to see valuable information. If the first email was about a departmental meeting time though the location was yet to be determined, but you now have that information because you did the booking, of course you would reply all to provide that necessary follow-up.

Bear in mind that, concerning **email security**, no matter who you select as the primary or secondary (CC'd) recipients of your email, always assume that it may be forwarded on to other people, including those you might not want to see it. Just because you've selected recipients doesn't necessarily make your email a private channel. You have no control over whether the recipients forward it on to others, what the server administrators do with it (legally or not), or if your account or the server is hacked. If your email contains any legally sensitive content, it can even be retrieved from the server storing it with a warrant from law enforcement. A good rule of thumb is to **never send an email that you would be embarrassed by if it were read by your boss, your family, or a jury**. No technical barriers prevent it from falling into their hands.

Return to the Email Parts menu

6.1.5: Message Opening

Most emails will be direct-approach messages where you get right to the point in the opening sentence immediately below the opening salutation. As we saw in §4.1.1 above on message organization, the **direct-approach** pattern does the reader a favour by not burying the main point under a pile of contextual background. If you send a busy professional on a treasure hunt for your main point, a request for information for example, don't blame them if they don't find it and don't provide the information you asked for. They might have given up before they got there or missed it when skimming, as busy people tend to do. By stating in the opening exactly what you want the recipient to do, however, you increase your chances of achieving that goal.

Table 6.1.5: Direct- vs. Indirect-approach Email Openings

Sample Direct Opening	Sample Indirect Opening
We have reviewed your application and are pleased to offer you the position of retail sales manager at the East 32nd and 4th Street location of Swansong Clothing.	Thank you very much for your application to the retail sales manager position at the East 32nd and 4th Street location of Swansong Clothing. Though we received a large volume of high-quality applications for this position, we were impressed by your experience and qualifications.

Indirect-approach emails should be rare and only sent in extenuating circumstances. Using email to deliver

bad news or address a sensitive topic can be seen as a cowardly way of avoiding difficult situations that should be dealt with in person or, if the people involved are too far distant, at least by phone (see Table 2.3 and Figure 2.3 on channel selection). Other circumstances that might force you to use the indirect approach for emails include the following:

- Needing to use persuasive techniques
- Having no other means of contacting the recipient
- Needing to get the email exchange in writing in case the situation escalates and must be handled as evidence by higher authorities
- Needing to deliver a large number of bad-news messages without having the time or resources to individually customize each, such as when you are sending rejection notices to job applicants (see the sample indirect opening in Table 6.1.5 above); out of expedience, it's understandable if these are boiler-plate responses

In such cases, the indirect approach means that the opening should use buffer strategies to ease the recipient into the bad news or set the proper context for discussing the sensitive topic (see §4.1.2 for more on the indirect approach).

Otherwise, your email must pass the **first-screen test**, which is that everything the recipient needs to see is visible in the opening without forcing them to scroll further down for it. Before pressing the Send button, put yourself in your reader's shoes and consider whether your message passes the first-screen test. If not, and if you have no good reason to take the indirect approach, then re-organize your email message by moving (copying, cutting, and pasting, or ctrl. + C, ctrl. + X, ctrl. + v) its main point up to make it the opening of your message.

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6.1.6: Message Body

Emails long enough to divide into paragraphs follow the three-part message organization (outlined in §4.1) where the message body supports the opening main point with explanatory details such as background information justifying an information request. With brevity being so important in emails, keeping the message body concise, with no more information than the recipient needs to do their job, is extremely important to the message's success. The message body therefore doesn't need proper three-part paragraphs (see §4.4.1 above). In fact, one-sentence paragraphs (single spaced with a line of space between each) and bullet-point lists (see §4.6.5) are fine. If your message grows in length beyond the first screen, document design features such as bold headings help direct readers to the information they need (see §4.6.2). If your message gets any larger, moving it into an attached document is better than writing several screens of large paragraphs. Unlike novels, people don't enjoy reading emails per se.

Also keep email messages brief by sticking to one topic per email. If you have a second topic you must cover with the same recipient(s), sending a separate email about it can potentially save you time if you need to retrieve that topic content later. If the subject line doesn't describe the topic you're looking for because it was a second or third topic you added after the one summarized in the subject line, finding that hidden message content will probably involve opening several emails. A subject line must perfectly summarize all of an email's contents to be useful for archiving and retrieval, so sticking to one topic per email will ensure both brevity and archive retrieval efficiency.

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6.1.7: Message Closing

An email closing usually includes **action information** such as direction on what to do with the information in the message above and deadlines for action and response. If your email message requests that its nine recipients each fill out a linked Doodle.com survey to determine a good meeting time, for instance, you would end by saying, *Please fill out the Doodle survey by 4pm Friday, May 18*. If the message doesn't call for action details, some closing thought (e.g., *I'm happy to help. Please drop me a line if you have any questions*) ends it without giving the impression of being rudely abrupt. Goodwill statements, such as *Thanks again for your feedback on our customer service*, are necessary especially in emails involving gratitude.

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6.1.8: Closing Salutation

A courteous closing to an email involves a combination of a pleasant sign-off word or phrase and your first name. As with the opening salutation, closing salutation possibilities depend on the nature of the message and where you want to position it on the formality spectrum, as shown in Table 6.1.8 below.

Table 6.1.8: Closing Salutation Examples

Formal	Semiformal	Informal
<i>Best wishes,</i>	<i>Best,</i>	<i>All good things,</i>
<i>Kind regards,</i>	<i>Get better soon,</i>	<i>Be well,</i>
<i>Much appreciated,</i>	<i>Good luck,</i>	<i>Bye for now,</i>
<i>Sincerely,</i>	<i>Take care,</i>	<i>Cheers,</i>
<i>Warm regards,</i>	<i>Many thanks,</i>	<i>Ciao,</i>

Your first email to someone in a professional context should end with a more formal closing salutation. Later

emails to the same person can use the appropriate semiformal closing salutation for the occasion. If you’re on friendly, familiar terms with the person but still want to include email formalities, an informal closing salutation can bring a smile to their face. Notice in Table 6.1.8 that you capitalize only the first word in the closing salutation and add a comma at the end.

Including your first name after the closing salutation ends in a friendly way as if to say, “Let’s be on a first-name basis” if you weren’t already, greenlighting your recipient to address you by your first name in their reply. In your physical absence, your name at the end is also a way of saying, like politicians chiming in at the end of campaign ads, “I’m [name] and I approve this message.” It’s a stamp of authorship. Omitting it gives the impression of being abrupt and too busy or important to stop for even a second of formal niceties.

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6.1.9: E-signature

Not to be confused with an electronic version of your handwritten signature, the e-signature that automatically appears at the very bottom of your email is like the business card you would hand to someone when networking. Every professional should have one. Like a business card, the e-signature includes all relevant contact information. At the very least, the e-signature should include the details given in Table 6.1.9 below.

Table 6.1.9: E-signature Part

E-signature Parts	Examples
Full Name, Professional Role Company Name Company address Phone Number(s) Company website, Email address	Jessica Day , Graphic Designer UXB Designs 492 Atwater Street Toronto, ON M4M 2H4 416-555-2297 (c) uxb.com jessica.day@uxb.com
Full Name, Credentials Professional Role Company Name Company Address Phone Number(s) Company website, email address	Winston Schmidt , MBA Senior Marketing Consultant Tectonic Global Solutions Inc. 7819 Cambie Street, Vancouver, BC V5K 1A4 604.555.2388 (w) 604.555.9375 (c) tectonicglobal.com m.bennington@tgs.com

Depending on the individual’s situation, variations on the e-signature include putting your educational credentials after your name (e.g., MBA) on the same line and professional role on the second line, especially if it’s a long one, and the company address on one line or two. Also, those working for a company usually include the company logo to the left of their e-signature. Some instead (or additionally) add their profile picture, especially if they work independently, though this isn’t always advisable because it may open you to biased

reactions. Other professionals add links to their social media profiles such as LinkedIn and the company's Facebook and Twitter pages. For some ideas on what your e-signature could look like, simply image-search "email e-signature" in your internet browser's search engine.

If you haven't already, set up your e-signature in your email provider's settings or options page. In Gmail, for instance, click on the settings cog icon at the top right, select *Settings* from the dropdown menu, scroll down the *General* tab, and type your e-signature in the Signature field. Make absolutely sure that all of the details are correct and words spelled correctly. You don't want someone to point out that you've spelled your professional role incorrectly after months of it appearing in hundreds of emails.

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6.1.10: Attachments

Email's ability to help you send and receive documents makes it an indispensable tool for any business. Bear in mind a few best practices when attaching documents:

- Always **announce an attachment** in an email message with a very brief description of its contents. For instance, *Please find attached the minutes from today's departmental meeting* might be all you write between the opening and closing salutations.
- **Never leave a message blank** when attaching a document in an email to someone else. Your message should at least be like the one given above. Of course, including a message is up to you if you're sending yourself an attachment as an alternative to using a dedicated cloud storage service like Google Drive or Microsoft OneDrive. Even if it's just for yourself, however, at least including a subject line identifying the nature of the attachment will make locating the file easier months or even years later.
- Ensure that your **attachment size**, if it's many megabytes (MB), is still less than your email provider's maximum allowable for sending and receiving. Gmail and Yahoo, for instance, allow attachments up to 25MB, whereas Outlook/Hotmail allow only 10MB attachments. However, files that are gigabytes (GB) large can be shared by using email to permit access to them where they're hosted in cloud storage services such as Google Drive, Microsoft OneDrive, Dropbox, and many others that have varying limits from 5GB for no-cost to 10TB for paid storage (Khanna, 2017).
- Always **check to ensure that you've attached a document** as part of your editing process. It shows that you lack attention to detail if your recipient responds to remind you to attach the document. Some of the more sophisticated email providers will remind you to do this as soon as you hit the Send button if you've mentioned an attachment in your message but haven't yet actually attached it. If you get into the habit of relying on this feature in one of your email providers (e.g., your personal Gmail account) but are on your own in others (e.g., your work or school email provider), the false sense of security can hurt you at some point when using the latter.

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6.1.11: Before Sending Your Email

Before hitting the Send button, follow through on the entire writing process described throughout this textbook's Unit I, especially the Editing stage with its evaluation, revision, and proofreading sub-stages explored in (see Ch. 5). Put yourself in your reader's position and assess whether you've achieved the purpose you set out to achieve in the first place. Evaluate also if you've struck the appropriate tone and formality. If you're aware that your tone is too angry, for instance, cool down by focusing on other business for a while. When you come back to your email draft the next day, you will usually find that you don't feel as strongly about what you wrote the day before. Review the advice about netiquette in §6.2, then replace the angry words with more carefully chosen expressions to craft a more mature response before hitting the Send button. You'll feel much better about this in the end than receiving the threat-heavy response your angry email would have prompted had you gone through with sending it.

After revising generally, **always proofread** an email. In any professional situation, but especially in important ones related to gaining and keeping employment, any typo or error related to spelling, grammar, or punctuation can cost you dearly. A poorly written email is insulting because it effectively says to the recipient: "You weren't important enough for me to take the time to ensure that this email was properly written." Worse, poor writing can cause miscommunication if it places the burden of interpretation on the reader to figure out what the writer meant to say if that's not clear. If the recipient acts on misinterpretations, and others base their actions on that action, you can soon find that even small errors can have damaging ripple effects that infuriate everyone involved.

Table 6.1.11: Editing a Poorly Written Information Request Email

Poorly Written Email Example	Improved Email Draft
<p>hey, think you made a mistake marking my last assinement i did what is supposed to do if its cuz i didnt get it in by the 5th its cuz i had a bad breakup it was so bad i had to see a councilor thats why i havnt bin around hope you understand. should of said that earlier maybe. oh and whens the next thing due. let me know as soon as u get this ok thanks bye</p>	<p>Hello, Professor Morgan:</p> <p>Could you please clarify why I failed the previous assignment?</p> <p>I believe I followed the instructions but may have been confused about the due date while dealing with some personal issues. If so, I apologize for my late submission and understand if that's the reason for the fail. I just wanted to confirm that that's the reason and whether there's anything I can do to make up for it.</p> <p>I assure you it won't happen again, and I'll pay closer attention to the syllabus deadlines from now on.</p> <p>Much appreciated, Taylor</p>

The poorly written draft has the look of a hastily and angrily written text to a “frenemy.” An email to a superior, however, calls for a much more formal, tactful, courteous, and apologetic approach. The undifferentiated wall of text that omits or botches standard email parts such as opening and closing salutations is the first sign of trouble. The lack of capitalization, poor spelling (e.g., *councilor* instead of *counselor*), run-on sentences and lack of other punctuation such as apostrophes for contractions, as well as the inappropriate personal detail all suggest that the writer doesn't take their studies seriously enough to deserve any favours. Besides tacking on a question at the end, one that could be easily answered by reading the syllabus, the writer is ultimately unclear about what they want; if it's an explanation for why they failed, then they must be upfront about that. The rudeness of the closing is more likely to enrage the recipient than get them to deliver the requested information.

The improved version stands a much better chance of a sympathetic response. It corrects the problems of the first draft starting with properly framing the message with expected formal email parts. It benefits from a more courteous tone in a message that frontloads a clear and polite request for information in the opening. The supporting detail in the message body and apologetic closing suggest that the student, despite their faults, is well aware of how to communicate like a professional to achieve a particular goal.

After running such a quality-assurance check on your email, your final step before sending it should involve protecting yourself against losing it to a technical glitch. Get in the habit of copying your email message text (ctrl. + A, ctrl. + C) just before hitting the Send button, then checking your Sent folder immediately to confirm that the email sent properly. If your message vanished due to some random malfunction, as can happen occasionally, immediately open a blank MS Word or Notepad document and paste the text there (ctrl. + V) to save it. That way, you don't have to waste five minutes rewriting the entire message after you solve the connectivity issues or whatever else caused the glitch.

For similar views on email best practices, see Guffey, Loewy, and Almonte (2016, pp. 90-97), which furnished some of the information given above.

Key Takeaway



Follow standard conventions for writing each part of a professional or academic email, making strategic choices about the content and level of formality appropriate for the audience and occasion.

Exercises



1. Take one of the worst emails you've ever seen. It could be from a friend, colleague, family member, professional, or other.
 - i. Copy and paste it into a blank document, but change the name of its author and don't include their real email address (protect their confidentiality).
 - ii. Use MS Word's Track Changes comment feature to identify as many organizational errors as you can.
 - iii. Again using Track Changes, correct all of the stylistic and writing errors.
2. Let's say you just graduated from your program and have been putting your name out there, applying to job postings, networking, and letting friends and colleagues know that you're on the job market. You get an out-of-the-blue email from someone named Dr. Emily Conway, the friend of a friend, who needs someone to put together some marketing brochures for her start-up medical clinic in time for a conference in a week. It's not entirely what you've been training to do, but you've done something like it for a course assignment once, and you need rent money, so you decide to accept the offer. Dr. Conway's email asks you five questions in the message body:
 - i. Our mutual friend mentioned you just graduated from college. What program? How'd you do?
 - ii. Can you send a sample of your marketing work?

- iii. How much would you charge for designing a double-sided 8½x11" tri-fold brochure?
- iv. When you've completed your design, would you be okay with sending me the ready-to-print PDF and original Adobe Illustrator file?
- v. If I already have all the text and pictures, how soon can you do this? Can you handle the printing as well?

Dr. Conway closes her email asking if you'd like to meet to discuss the opportunity in more detail and signs off as Emily. Draft a formal response email that abides by the conventions of a formal email.

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6.2: NETIQUETTE AND SOCIAL MEDIA

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
3. Select and use common, basic information technology tools to support communication.
4. Discuss emerging netiquette standards in social media used for professional purposes.

We create and curate personal profiles, post content and comments, and interact via social media as a normal part of both our personal and professional lives. How we conduct ourselves on the open internet can leave a lasting impression, one not so easily undone if it's regrettable. The hilarious but compromising selfie you posted on Instagram five years ago is still there for your potential employer to find, judge for what it says about your professionalism, and speculate about what customers might think if they saw it too. That sarcastic but not-so-PC reply to a public post on Facebook or Twitter in a heated moment a decade ago can come back to haunt you. We're all learning as we go in this new media environment, but any mistakes we make along the way, no matter how much we've matured since, are still there for all to see and can have lasting impacts on our careers. Many candidates for political office have been taken down by their past social-media posts and the agents tasked with digging them up (Harris, 2015), and you can be sure that untold numbers of job applicants have similarly scuppered their chances with similar cavalier shares. Some guidance about what can be done about those mistakes, as well as how to conduct ourselves properly moving forward, can help improve your employability (adapted from *Business Communication for Success*, 2015, 9.1).

- 6.2.1: Shea's Netiquette
- 6.2.2: Legal Considerations
- 6.2.3: Using Social Media Professionally

6.2.1: Shea's Netiquette

Virginia Shea's Rules of Netiquette

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

Her rules speak for themselves and remind us that the golden rule (treat others as you would like to be treated) is relevant wherever there is human interaction (*Business Communication for Success*, 2015, 9.1).

6.2.2: Legal Responsibilities

Your writing in a business context means that you represent yourself and your company. What you write and how you write it can be part of your company's success but can also expose it to unintended consequences and legal responsibility. When you write, keep in mind that your words will keep on existing long after you have moved on to other projects. They can become an issue if they exaggerate, state false claims, or defame a person or legal entity such as a competing company. Another issue is plagiarism, using someone else's writing without giving credit to the source. Whether the "cribbed" material is taken from a printed book, a website, or a blog, plagiarism is a violation of copyright law and may also violate your company policies. Industry standards often have legal aspects that must be respected and cannot be ignored. For the writer this can be a challenge, but it can be a fun challenge with rewarding results.

The rapid pace of technology means that the law cannot always stay current with the realities of business communication. Computers had been in use for a couple of decades before the Copyright Act of 1985 was amended in 1997 to deal with internet-enabled copyright infringement. Technology advanced even further before the next major amendment came with the *Copyright Modernization Act* of 2012. Developments since then will continue to demand new laws to clarify what is fair and ethical, what should be prohibited, and who owns the rights to what.

For example, suppose your supervisor asks you to use your Facebook page or Twitter account to give an

occasional “plug” to your company’s products. Are you obligated to comply? If you later change jobs, who owns your posts or tweets—are they yours, or does your now-former employer have a right to them? And what about your network of “friends”? Can your employer use their contact information to send marketing messages? These and many other questions remain to be answered as technology, industry practices, and legislation evolve (Tahmincioglu, 2009).

Our product is better than X company’s product. Their product is dangerous and you would be a wise customer to choose us for your product solutions.

What’s wrong with the two sentences above? They may land you and your company in court. You made a generalized claim of one product being better than another, and you stated it as if it were a fact. The next sentence claims that your competitor’s product is dangerous. Even if this is true, your ability to prove your claim beyond a reasonable doubt may be limited. Your claim is stated as fact again, and from the other company’s perspective, your sentences may be considered libel or defamation.

Libel is the written form of defamation, or a false statement that damages a reputation. If a false statement of fact that concerns and harms the person defamed is published—including publication in a digital or online environment—the author of that statement may be sued for libel. If the person defamed is a public figure, they must prove malice or the intention to do harm, but if the victim is a private person, libel applies even if the offense cannot be proven to be malicious. You have a Charter right to express your opinion (section 2[b]), but the words you use and how you use them, including the context, are relevant to their interpretation as opinion versus fact. Always be careful to qualify what you write and to do no harm (*Business Communication for Success*, 2015, 4.5).

6.2.3: Using Social Media Professionally

Review sites, blogs, tweets, and online community forums are some of the continually developing means of social media being harnessed by business and industry to reach customers and other stakeholders. People’s comfort in the online environment forces businesses to market and interact there or risk a massive loss in sales and interest. Though most users learn how to use social media as an extension or facilitator of their social lives, using the same platforms for professional reasons requires some change in behaviour.

First, recognize that every modern business or organization should have a social media presence in the sites they expect their customer base to frequent, especially popular sites such as Twitter, Facebook, and Instagram. Messaging here must be consistent across the platforms when alerting the customer base of important information such as special events, deals, and other news.

Next, follow expert advice on how to properly take advantage of social media in detail to promote your operation and reach people. Large companies will dedicate personnel to running their social media presence, but small businesses can do much of it themselves if they follow some decent online advice such as the following pages:

- The Do's and Don'ts of How to Use Facebook for Business [Infographic] (Mineo, 2017)
- The Ultimate Guide to Twitter for Small Business in 2017 (Jackson, 2016)
- How to Use Instagram for Business: A Complete Guide for Marketers (Dawley, 2018)

Know also that social media is a constantly evolving environment. Stay on trend by continually searching out and implementing the latest advice similar to the above.

Finally, always consider how the sites you access and what you post represent you and your employer, even if you think others don't know where you work or who you are. Internet service providers (ISPs) are required by law to archive information concerning the use and traffic of information that can become available under subpoena. Any move you make leaves digital footprints, so you will have to answer for any misstep that brings shame upon you or your company (*Business Communication for Success*, 2015, 19.4).

Key Takeaway



Whether in the public or private corners of the internet, conduct yourself online in a manner that is always conducive to your professional success, following established netiquette principles, as well as using social media effectively and responsibly.

Exercises



1. Recount how you have experienced a breach of netiquette such as online bullying. Were you a perpetrator, enabler, victim, or combination? What did you learn from it?
2. Identify and explain three ways that you can professionalize your online presence using social media.

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6.3: TEXTING AND INSTANT MESSAGING

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
3. Select and use common, basic information technology tools to support communication.
4. Discuss emerging netiquette standards in social media used for professional purposes.
5. Use rapid electronic communication channels such as texting and instant messaging in a professional manner.

Whatever digital device you use, written communication in the form of Short Message Service (SMS), or texting, has been a convenient and popular way to connect since the 1990s. Instant messaging (IMing) apps like Snapchat, WhatsApp, and Facebook Messenger have increased the options people have to send and respond to brief written messages in real time when talking on the phone would otherwise be inconvenient. In business, texting and IMing are especially advantageous for hashing out details precisely in writing so that they can be referred to later. Texting and IMing are not useful for long or complicated messages but are great for connecting while on the go. However, consider your audience and company by choosing words, terms, or abbreviations that will deliver your message most effectively using these communication tools.

Tips for Effective Business Texting:

- Know your recipient; “? % dsct” may be an understandable way to ask a close associate what the proper discount is to offer a certain customer, but if you are texting or IMing your boss, it might be wiser to write, “what % discount does Murray get on \$1K order?”
- Anticipate unintentional misinterpretation. Texting often uses symbols and codes to represent thoughts, ideas, and emotions. Given the complexity of communication, and the useful but limited tool of texting, be aware of its limitation and prevent misinterpretation with brief messages.
- Contacting someone too frequently can border on harassment. Texting is a tool. Use it when

appropriate but don't abuse it.

- Unplug yourself once in awhile. Do you feel constantly connected? Do you feel lost or “out of it” if you don't have your cell phone and cannot connect to people, even for fifteen minutes? Sometimes being unavailable for a time can be healthy—everything in moderation, including texting.
- Don't text and drive. Research shows that the likelihood of an accident increases dramatically if the driver is texting behind the wheel (Houston Chronicle, 2009). Being in an accident while conducting company business would reflect poorly on your judgment as well as on your employer (*Business Communication for Success*, 2015, 9.1).

Key Takeaway



Professionalize your use of rapid electronic communication such as texting and instant messaging so that you can assume a competitive advantage throughout your careers.

Exercises



1. Write out your answers to the following questions:

- How old were you when you got your first mobile phone?
- When did you send your first text?
- How many texts do you send per day, on average, now?
- How many times do you speak on the phone with the same device, on average, throughout your day? If you call (or receive calls) far less than text, why do you think that is?
- Is the first thing you look at when you wake up in the morning your smartphone notifications, and are they the last thing you look at before you go to sleep at night? If so, why? If not, why do you think it is for so many people?
- Do you think it's fair to say that your smartphone use can be characterized as an addiction? If so, how is it impeding you from living a more healthy and fulfilling life? Is there anything you

are prepared to do about it? If not, do you see it as a problem for people around you? Do you challenge them on it? Do you find it a challenge to discipline yourself to prevent it from being an addiction in your case?

2. Identify three ways that you must change your texting and IM behaviour in professional—rather than purely social—contexts.

CHAPTER 7: TRADITIONAL WRITTEN COMMUNICATION

Jordan Smith

Chapter Learning Objectives

1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Identify the parts of effective letters.
3. Identify the parts of effective memos.
4. Identify the parts of effective reports.

We continue our applied-writing unit with traditional document forms that are still vital to the functioning of modern businesses have. Despite origins as handwritten and typed hard-copy documents, letters, memos, reports, and proposals continue to prove their worth both in the form of printed hard copies and electronic documents shared by email. Every professional should familiarize themselves with the conventions associated with each type of document so that they can use them to achieve their particular purposes.

- 7.1: Letters
- 7.2: Memos
- 7.3: Reports
- 7.4: Proposals

7.1: LETTERS

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Identify the parts of effective letters..

As one of the most formal documents you can send, a letter conveys a high degree of respect to its recipient. Sending a letter is your way of saying that the recipient matters. Letters are usually one- to two-page documents sent to people or organizations outside of the organization from which they're sent, whereas memos are equivalent documents for formal communications within an organization (see §7.2 below). Though we use email for many of the occasions that we used to send letters for before the twenty-first century, letters are still sent rather than emails for several purposes:

- Cover letters to employers in job applications
- Thank-you letters and other goodwill expressions
- Letters of recommendation (a.k.a. reference letters)
- Letters of transmittal to introduce reports or proposals
- Campaign initiatives, such as for fundraising or political advocacy
- Official announcements of products, services, and promotions to customers
- Claims and other complaints sent to companies to lay down a formal paper-trail record as evidence in case matters escalate into the court system
- Formal rejection notices to job or program applicants
- Collection notices to people with overdue payments

In these cases, letters offer the advantage of formality, confidentiality (it's illegal to open someone else's mail), and a record of evidence.

There are two main types of letters: block-style letters and modified-block style. The block style used

by organizations has a company letterhead at the top, whereas modified-block letters are typically written independently by individuals. Though you may see minor format variations from company to company, letters have 10-12 major parts, each of which we'll examine for the conventions that, if followed, show that you are able to write to a high standard of formality should the occasion call for it.

Letter Parts

- 7.1.1: Return Address or Company Letterhead
- 7.1.2: Date Line
- 7.1.3: Recipient Address
- 7.1.4: Subject Reference
- 7.1.5: Opening Salutation
- 7.1.6: Message Opening
- 7.1.7: Message Body
- 7.1.8: Message Closing
- 7.1.9: Closing Salutation
- 7.1.10: Signature
- 7.1.11: Signature Block
- 7.1.12: Enclosure Notice

Before delving into this detail, however, let's review the advantages, disadvantages, and occasions for using letters given earlier in Table 2.3 on channel selection.

Table 2.3 Excerpt: Letter Pros, Cons, and Proper Use

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Letter	<ul style="list-style-type: none"> Shows respect through formality and effort Ensures confidentiality when sealed in an envelope and delivered to the recipient's physical address (it is illegal to open someone else's mail) Can introduce other physical documents (enclosures) 	<ul style="list-style-type: none"> Slow to arrive at the recipient's address depending on how far away they are from the sender Can be intercepted or tampered with in transit (albeit illegally) Can be overlooked as junk mail Time consuming to print, sign, seal, and send for delivery Mail postage is costlier than email 	<ul style="list-style-type: none"> Follow conventions for different types of letters (e.g., block for company letters, modified block for personal letters) and provide the sender's and recipient's address, date, recipient salutation, closing salutation, and author's signature Use company letterhead template when writing on behalf of your organization 	<ul style="list-style-type: none"> For providing a formal, permanent, confidential written message to a single important person or organization Ideal for job applications (cover letter), persuasive messages (e.g., fundraising campaigns), bad-news messages, matters with possible legal implications (e.g., claims), and responses to letters For non-urgent matters

7.1.1: Return Address or Company Letterhead

The first piece of information in a letter is usually the sender's address. In block-style letters, the address appears as part of the company letterhead in the header under or beside the prominently displayed and brand-stylized company name and logo. Use a company letterhead template whenever writing on behalf of the company you work for; never use it for personal messages (e.g., reference letters for a relative) not authorized by the company. The company letterhead address usually appears in the one-line style following the format given below:

[Street number] [Street name] [Street type], [City or town], [Provincial abbreviation] [two spaces] [Postal code with a single space in the middle]

Example: 1385 Woodroffe Avenue, Ottawa, ON K2G 1V8

See §7.1.3 below for more on address styles. The letterhead also includes other contact information such as phone and fax numbers, as well as the company web address. Some company letterhead templates move some

or all of these parts, besides the company name and logo, to the footer so that the whole page is framed with company branding. For dozens of letter template examples, go to open a blank new document in MS Word and type “letter” into the document type or go to Letters (Microsoft Office, 2014).



Figure 7.1.1: Selection of Microsoft Word business letter templates

Because **modified-block-style letters** are sent by individuals unaffiliated with a company, they typically include only the sender’s two-line address at the top, which divides the above address style in half so that the street number, name, and type go on the first line (with no comma at the end), and the city/town, provincial abbreviation, and postal code go on the second, as shown below:

Example:

1385 Woodroffe Avenue

Ottawa, ON K2G 1V8

In both styles of address, strike a formal tone by fully spelling out the street type rather than abbreviating it (e.g., *Street*, not *St.*; *Avenue*, not *Ave.*; *Road*, not *Rd.*; *Crescent*, not *Cres.*; *Boulevard*, not *Blvd.*; *Court*, not *Crt.*; etc.). Using the abbreviations is fine in informal, personal letters, however.

A distinguishing feature of the modified-block style is that the sender address is justified (flush) to the vertical middle of the page (i.e., the left edge of its text lines up with it) rather than the left margin. Do this by highlighting the two address lines, then clicking and dragging the base of the left-margin tab in your word processor’s ruler right to the vertical midpoint of the page. If your page has 2.5cm margins, that would be at around the 8.25cm mark. Note that modified-block-style letters place the sender’s address on the first line below the header (i.e., about an inch or 2.5cm from the top edge of the page) and don’t include the sender’s name at the top of this address block. The reader can find the sender’s name by darting their eyes down to the signature block at the bottom.

In some circumstances, you may want to use block-style letters with a letterhead when writing on your own behalf rather than for a company. When writing a cover letter, for instance, you can stylize your name prominently as if it were the name of a company so that it stands out in a larger font in bold typeface, possibly in an eye-catching colour. Because this appears in the header margin, adopting the block style has the additional advantage of placing your name and contact information automatically on every page so that consistent personal branding extends to the one- to two-page résumé that follows, including the references page that would be separated out for confidentiality reasons (see §9.2.2.1 and §9.3.1 below).

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7.1.2: Date Line

In a formal letter, the date must follow the unambiguous style that fully spells out the month, gives the calendar date, a comma, and the full year (e.g., April 25, 2020). In block-style letters, this appears left-justified (its left edge lines up with the left margin) often with 2-3 lines of space between it and the company letterhead above it and, for symmetry, as much between it and the recipient address below.

In modified-block-style letters, however, the date often appears as the third line of the sender address block. Its left edge therefore lines up with the vertical middle of the page. Only one line of space should separate the date line from the recipient address below. After this, block-style and modified-block letters are formatted in the same way until you get to the signature block at the bottom.

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7.1.3: Recipient Address

No matter what style of letter you use, the recipient address is left-justified, begins with the recipient’s full name on the top line, and follows with their mailing address on the lines below in the format options given in Table 7.1.3 below.

Table 7.1.3: Standard Letter Address Format for Company and Personal Recipients

Address Format	Examples
Title Full Name, Professional Role Company Name # Street Type Town/City, PA A1B 2C3	Dr. Michelle Masterton, Geriatrician Tidal Healthcare Clinic 6519 Maynard Street Halifax, NS B4L 6C9
Title Full Name, Credentials Professional Role (if long) # Street Type Town/City, PA A1B 2C3	Mr. Jonathan Carruthers, MBA Freelance Marketing Consultant 3489 Cook Street Victoria, BC V9G 4B2

Notice that commas follow only (1) the recipient’s name if followed by a professional role (capitalized) or credentials abbreviation and (2) the city or town. Two spaces separate the provincial abbreviation (PA) from the postal code, which has a single space in the middle dividing the six alpha-numeric characters into two groups of three for readability. Though you sometimes see addresses that fully spell out the province, rather than abbreviate it, and have only one space between the province and postal code, the style given above is

dominant and has the advantage of being more concise and clearly distinguishing the province from the postal code without crowding the line with commas. Keep the end of each line free of any punctuation.

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7.1.4: Subject Reference

Like a subject line in an email, letters can have subject lines that indicate the topic or purpose. The same titling principles as email apply (see §6.1.3 above), only the letter's subject reference begins with “**Re:**” or “RE:” and is entirely in either bold typeface or all-caps, but not both. You might also see it positioned above or below the opening salutation, but usually above. Like all the text blocks besides the date line, a blank line of space separates this from the other parts above and below.

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7.1.5: Opening Salutation

The most common opening salutation for a letter is given in Table 7.1.5 below:

Table 7.1.5: Opening Salutation

Opening Salutation Form	Examples
Dear [Title] [Full or Last Name]:	Dear Ms. Françoise Hardy: Dear Mr. Serge Gainsbourg: Dear Mrs. Pattie Boyd: Dear Dr. Landy: Dear Ms. Vartan: Dear Dana Dortmund:

The Dear, title, full name, and colon all signal formality. Variations in formal letters include omitting the title or the first name, but not both at once. Omit the title if you're at all concerned about its accuracy. For instance, if the recipient's first name is a unisex name and you're not sure if they're male or female, skip the gender title to avoid offending the recipient by mixing up their gender. Unless you're sure that the recipient prefers *Mrs.* (indicating that she's married) over *Ms.* because she's used it herself, *Ms.* might be the safer option. Avoid the title *Miss* because it's no longer commonly used and appears outdated. If you're addressing someone who identifies as non-binary, then *Mx.* might be best if you must use a title, or just no title at all. Other considerations in the opening salutation include the following:

- Using the recipient's first name only is appropriate only if you know them well on a friendly, first-name basis.
- Using a comma instead of a colon is appropriate only for very informal letters.
- *To whom it may concern:* is an appropriate opening salutation only if you really intend for the letter to be read by whomever it is given to, as in the case of a reference letter that an applicant gives copies of to potential employers. Otherwise, every effort should be made to direct the letter to a particular person, especially cover letters. If an employer has deliberately omitted any mention of who is responsible for hiring an applied-for position, addressing the person by professional role (e.g., *Dear Hiring Manager:*) is acceptable (see §9.3.2.1 below).

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7.1.6: Message Opening

Letters are ideal for both direct- and indirect-approach messages depending on the occasion for writing them. Consistent with what we saw in §4.1.1 above, direct-approach letters get right to the point by stating their main point or request in a paragraph of no more than a sentence or two. Letters organized with openings like this lend themselves to positive or neutral messages. Ideal for formally delivering bad-news or persuasive messages, indirect-approach letters begin with a buffer paragraph—again, this may only be a sentence or two—just to say some nice things before getting to the bad news or difficult request in the body of the message. (See §4.1.2 for more on the indirect approach).

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7.1.7: Message Body

Whether the opening takes the direct or indirect approach, the body supports this with explanatory detail (see §4.1 above on message bodies). Ensure that your message body abides by the 6 Cs of (see §4.5.2 above), especially conciseness because a letter should only be a page or two. If appropriate for the content, use effective document design features such as numbered or bulleted lists to improve readability (see §4.6.5 above). For instance, if your letter contains a series of questions, use a numbered list so that the reader can respond to each with a corresponding numbered list of their own.

Message body paragraphs should be proper three-part paragraphs (see §4.4.1 above). Like all other text blocks throughout (except for the return address above and signature block below in a modified-block letter), every line in the message body must be flush to the left margin, including the first. In other words, rather than indent a paragraph's first line as novels do to mark where one paragraph ends and another begins, separate them with a blank line. Brevity in formal letters limits the number of paragraphs to what you can fit in a page or two.

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7.1.8: Message Closing

The closing mirrors the opening with a sentence or two that wraps up the letter with something relevant to the topic at hand (see §4.1 above on message closings). Because of their formality, letters almost always end with a goodwill statement, such as an expression of gratitude thanking the reader for their attention or consideration. For instance, a cover letter thanks the reader for their consideration, invites them to read the enclosed résumé, and expresses interest in meeting to discuss the applicant’s fit with the company in person since getting an interview is the entire point of an application. A thank-you letter will thank the recipient again, and a recommendation letter will emphatically endorse the applicant. Even letters delivering bad news or addressing contentious situations should end with pleasantries rather than hostile or passive-aggressive jabs.

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7.1.9: Closing Salutation


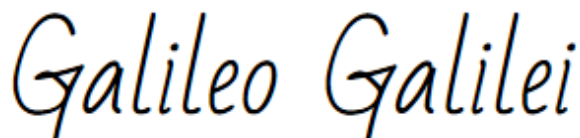
A simple *Sincerely* or *Cordially* are standard business letter closing salutations that signal the formal end of the message much like the opening salutation did before the beginning of the message proper. A more personal letter sent to someone you know well may end with *Yours truly* (with the second word all lowercase), but don’t use this with someone you’ve never met or with anyone you want to maintain a strictly professional relationship with. Always place a “hanging comma” at the end of the line, as you can see in Table 7.1.10 below.

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7.1.10: Signature

Your signature is a guarantee of authorship that carries legal weight. In a printed letter, leave enough space—usually about three single-spaced lines—to autograph your signature by hand. When sending a letter that you write and submit completely electronically, you have two options for an electronic signature, as explained in Table 7.1.10 below. Of the two, an image of your hand-written signature looks much more professional than a typed-out version using a simulated handwriting font. The hand-written image gives the impression that you are adept at technology.

Table 7.1.10: How to Make Signatures for Electronically Written and Sent Letters

Signature Image	Simulated Signature
<p>Sincerely,</p>  <p>Galileo Galilei, Astronomer Image source: Connormah (2009)</p> <ol style="list-style-type: none">1. Write your signature several times on a piece of blank, white paper.2. Scan the document.3. Crop the best image into a close-fitting jpeg image file. If the scanner makes a PDF file of the scanned image, make a jpeg file of the best signature by using the Snipping Tool (Microsoft Support, 2017) with the file type set to jpeg and saving the captured image.4. Drag and drop the signature image from the folder where you saved it to the space between your closing salutation and your full printed name in the signature block.5. Adjust the signature size so that it occupies the equivalent of about 2-3 single-spaced lines and delete any blank lines of space above and below it so that it fits snugly between the closing salutation and your full printed name.	<p>Sincerely,</p>  <p>Galileo Galilei, Astronomer</p> <ol style="list-style-type: none">1. Type your name on the line between your closing salutation and full printed name in the signature block.2. Highlight it.3. Go to the font selection dropdown menu and select a simulated handwriting signature that is common to most computers such as Freestyle Script.4. Adjust the font size so that your simulated signature occupies the equivalent of 2-3 single-spaced lines.

Don't cut corners when assembling an image of your handwritten signature. For instance, taking a smartphone photo of your signature rather than scanning it will look amateurish because the background will probably be greyish or another off-white shade that will clash with the pure white of your page background. Also, drawing your signature with your computer's mouse or touchpad will look shaky like it was signed by a seven year-old. The inserted signature image must be seamlessly integrated and smoothly drawn for it to look professionally done.

Besides giving the impression that you're adept at technology, making an image file of your handwritten signature for electronic letters also sets you up for using it repeatedly to sign contracts and other documents electronically. If current labour trends take us to a predominant gig economy (Nazareth, 2017), having a shortcut for signing emailed contracts will save you time. Unless you're sent a contract via DocuSign or an

equivalent technology solution to legally sign documents in a secure manner, a PDF contract sent to you would otherwise require printing it out, signing it, scanning it, and emailing it back. With a signature image, you can just drag and drop your signature into the document after downloading it, re-save it as a PDF, and email it back to the employer in a minute or two.

Though the simulated signature is certainly easier to put together, it carries with it several problems: it looks lazy and even tacky, carries no legal authority, and may not appear as a simulated signature font when it's opened by the recipient on another computer. If it's opened on, say, a Mac computer when you wrote it on a Windows-based PC, the signature might be converted into 25-pt. Arial font, making the recipient wonder why you chose a font that looks nothing like handwriting for your signature. The reason is that their computer didn't have the signature font you chose, or something was lost in translation, and their reader rendered the signature into a different font. For these reasons, using an image of your actual signature is better.

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7.1.11: Signature Block

The signature block clarifies the sender's name in full since handwritten signatures are rarely legible enough to do so themselves. The sender's professional role follows their name either on the same line (with a comma in between) if both the name and role are short enough, and on the second line if they are too long together. On the line below the sender's name and role can appear the name of the company they work for and their work email address on the third line; all three lines are single-spaced. If you are writing independently, putting your email address and phone number on the line(s) after your printed name depends on if you used a simple modified-block style address at the top, in which case you should add your contact info the signature block. If you used a personal letterhead, perhaps for a job application cover letter, then you need not include anything more than your full printed name in your signature block.

Sometimes letters are written on someone else's behalf, perhaps by an administrative assistant. In such cases, the signature and typed-out name of the person responsible for the letter is given at the bottom, then the initials of the person who typed it appear after a line of space below the last line of the signature block.

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7.1.12: Enclosure Notice

Just as emails can include attachments, letters are often sent along with other documents. Cover letters introduce résumés, for instance, and letters of transmittal introduce reports to their intended recipients. In such cases, an enclosure notice on the very last line of the page (above the footer margin) tells the reader that another document or other documents are included with the letter. This would look like the following:

Enclosures (2): Résumé, Portfolio

For other documents included with the letter, simple, brief titles such as *Brochure* or *Thank-you Card* would suffice. Separate each with a comma if you have more than one.

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7.1.13: Before Sending Your Letter

Given the importance of the letter you're writing, especially if it has to do with employment, editing is crucial to your career success. Even a single writing error in a cover letter, for instance, is enough to prompt the reader to dump it in the shredder without even glancing at the enclosed résumé, making the applicant's efforts useless. Apply all the revising and proofreading advice in Ch. 5 above to ensure that the letter fulfills its purpose and represents you well with its flawless attention to detail.

Ensure also that your letter meets all expectations for standard business letter format. In North America, the page must be 8.5" x 11" (21.6 x 27.9cm) with one-inch (2.5cm) or 3cm margins all around. Though letterhead and graphic elements may go in the header and footer for company branding purposes, the side margins must remain blank. Make the font 12-point Times New Roman or a similar serif font, or alternatively a sans-serif font such as Arial, but definitely not something exotic like Papyrus (see §4.6.3 above on font). Single-space the text by ensuring that the line spacing is 1.0 in your word processor, which may be different from your word processor's default (the MS Word default is 1.08). Adjusting the default setting that adds additional line spaces every time you hit the Enter or Return key is essential to avoiding the effect of the line spacing looking like it's double even when you indeed set it to single (see §4.6.4 above for more on line spacing).

Though letters sent electronically can be attached in emails or uploaded to a website, hard-copy letters must be printed out and signed. Those mailed on their own or perhaps with one or two enclosed pages can be folded twice to make three horizontal panels of equal height so that the letter fits in a standard 4 1/8" x 9 1/2" envelope. When a hard-copy letter covers extremely important documents (e.g., a mailed job application or report), consider sending them pristinely unfolded in a 9" x 11.5" envelope.

Finally, ensure that you leave enough time for your letter to arrive at its destination if punctuality is a factor. Though letters sent to a destination within your city may take only a couple of days to get there, those sent across the country may take a week or longer depending on weekend and holiday slow-downs (e.g., letters sent during the Christmas holiday season take longer to arrive). Email has largely replaced hard-copy letters because it ensures that a message gets to its destination the instant you press *Send*, so send letters when urgency isn't an issue.

For more perspectives on business letters, including slight format variations, see the following resources:

- How to Format a Business Letter (Doyle, 2018)
- Writing the Basic Business Letter (Purdue OWL, n.d.)
- How to Write a Business Letter (wikiHow, 2018)

Key Takeaway



If you need to send a highly formal message to show respect to your recipient and ensure confidentiality, follow standard business letter conventions.

Exercises



1. Put together a letterhead template for a fictional company that you might work for, or even start yourself, in the career you're training for. There's no need to go overboard with a fancy with a logo design; many companies' trademark is just their company name in an interesting font (e.g. Google or the fictional Dunder Mifflin in the TV show *The Office*). Include fictional contact information either at the top or bottom.
2. Using the company letterhead template you designed for Exercise #1, write a letter that you would send to everyone in your customer contact database advertising a new product or service that you would offer in the career you're training for.
3. If you did the email assignment at the end of §6.1.11, revise it in the form of a personal modified-block-style letter (invent details as necessary, including Dr. Emily Conway's company name and address for the recipient address block). Ensure that it is perfectly written in a formal style.

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7.2: MEMOS

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
3. Identify the parts of effective memos.

A memo (or memorandum, meaning “reminder”) communicates policies, procedures, short reports, or related official business within an organization. It assumes a one-to-all perspective, broadcasting a message to a group audience, rather than to individuals such as what email or letters often do. Memos are objective in tone and avoid all personal bias or subjective preference, especially because they may have legal standing when reflecting policies or procedures. Accuracy is therefore paramount in memos lest ambiguities result in mistakes that then become legal matters (Business Communication for Success, 2015, 9.2).

Memo Topics

- 7.2.1: Memo Purpose
- 7.2.2: Memo Formats

Before exploring memos in more detail, let’s review the advantages, disadvantages, and occasions for using memos given earlier in Table 2.3 on channel selection.

Table 2.3 Excerpt: Letter Pros, Cons, and Proper Use

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Memo	<ul style="list-style-type: none"> Provides a written record of group decisions, announcements, policies, and procedures within an organization Can also be a format for delivering small reports (e.g., conference report) and recording negotiating terms in agreements between organizations (e.g., memo of understanding) Can be posted on a physical bulletin board and/or emailed 	<ul style="list-style-type: none"> Requires a good archiving system to make memos easily accessible for those (especially new employees) needing to review a record of company policies, procedures, etc. 	<ul style="list-style-type: none"> Use template with company letterhead Follow the same conventions as email, except omit the opening and closing salutations and e-signature 	<ul style="list-style-type: none"> For a written record for decisions, announcements, policies, procedures, and small reports shared within an organization Post a printed version on an office bulletin board and email to all involved

7.2.1: Memo Purpose

A memo's purpose is often to inform, but it occasionally includes an element of persuasion or call to action. All organizations have informal and formal communication networks. The unofficial, informal communication network within an organization, the "grapevine," is often a channel for rumour, gossip, and innuendo. On the grapevine, one person may hear that someone else is going to be laid off and start passing the news around. Rumours often distort the truth more and more the further along they are passed. Before you know it, the word is that the company is shutting down your entire department.

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

other alternatives to driving to work and filling up the parking lot with their single-occupant vehicles. In this way, memos often represent the business or organization's interests. They may also include statements that align business and employee interest, and underscore common ground and benefit (Business Communication for Success, 2015, 9.2).

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7.2.2: Memo Format

A memo often has a letterhead with "MEMO" and the company name and logo at the top of the page. Below this are the header fields identifying the recipient, author, date, and subject much like you would see in an email. In fact, email's header fields are based on those traditionally found in memos, so the same principles for what to include here, such as how to title the document in the subject line, are true of emails (see §6.1.3 above).

Unlike emails, memos omit the opening salutation but, from there, are similar in their three-part message organization with an opening, body, and closing. Always direct-approach, the memo message opening states the main point, the body supports this with details, and the closing gives action information or a summary. Let's examine a sample memo in Figure 7.2.2 below.

To: All Employees

From: Larry Ogawa, President, University of State

Date: February 14, 2009

Subject: Future Expenditure Guidelines

After careful deliberation, I have determined it is necessary to begin the initial steps of a financial stewardship program that carries UState through what appears to be a two-year cycle of a severe state shortfall in revenue and subsequent necessary legislative budget reductions.

Beginning February 9, 2009, the following actions are being implemented for the General Fund, Auxiliary Fund, and Capital Fund in order to address the projected reductions in our state aid for the remainder of this year 2008-09 and next year 2009-10.

1. Only purchases needed to operate the university should be made so that we can begin saving to reduce the impact of 2009-10 budget reductions.
2. Requests for out-of-state travel will require approval from the Executive Committee to ensure that only necessary institutional travel occurs.
3. Purchases, including in-state travel and budget transfers, will require the appropriate vice president's approval.

Please understand that we are taking these prudent steps to create savings that will allow UState to reduce

the impact of projected cuts in expected 2009-10 legislative reductions. Thank you for your cooperation, and please direct any questions to my office.

Figure 7.2.2: Sample Memo

(Business Communication for Success, 2015, 9.2)

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For more on memos, see the following resources:

- *Purdue OWL's four Memos modules, starting with Audience and Purpose (Perkins & Brizee, 2018)*
- How to Write a Memo (wikiHow, 2018)

Key Takeaway



Record office policies, procedures, and short reports for formal distribution within an office following memo conventions.

Exercises



1. Let's say a new bylaw affects the way you do business in the career you're training for. Assuming you've risen to the position of manager at your workplace, write a memo that explains the new bylaw and how you will adjust the way you conduct business there. Be creative with both the bylaw and your policy or procedure with respect to it.
2. Imagine that your company is about to adopt a new technology (e.g., new software, new laptops, mobile phones, etc.). Inform the employees and discuss the benefits of the new tool in a memo. Explain in point-form, as in the example above, how this development will impact their work.

3. Write a short a summary field study report (see #3 in Table 7.3.1 below) for a class lecture in one of your other courses this week. Use a one-page memo to describe the conference and summarize the lecture as if you were reporting it to classmates who could not attend. Summarize the lecture topic accurately and concisely.

References

Perkins, C., & Brizee, A. (2018, March 23). Memos: Audience and Purpose. *Purdue OWL*. Retrieved from <https://owl.english.purdue.edu/owl/resource/590/1/>

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7.3: REPORTS

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
4. Identify the parts of effective reports.

A vital part of any business or organization, reports document specific information for specific audiences, goals, or functions. The type of report is often identified by its primary purpose or function, as in an accident report, a laboratory report, a sales report, or even a book report. Reports are often analytical but sometimes just “report the facts” with no analysis at all. Other reports summarize past events, present current data, and forecast future trends. While a report may have conclusions, propositions, or even calls to action, presenting analysis is the primary function. A sales report, for example, is not designed to make an individual sale. It is, however, supposed to report sales to date and may forecast future sales based on previous trends (*Business Communication for Success*, 2015, 9.4).

Report Topics

- 7.3.1: Types of Reports: Informational and Analytical
- 7.3.2: Report Organization

Before delving into reports in detail, however, let’s review the advantages, disadvantages, and occasions for writing them as given earlier in Table 2.3 on channel selection.

Table 2.3 Excerpt: Letter Pros, Cons, and Proper Use

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Report	<ul style="list-style-type: none"> Allows presentation of a high volume of information presenting research and analysis Can take various forms such a document booklet or proposal for reading alone or PowerPoint for presenting 	<ul style="list-style-type: none"> Time-consuming to write with proper research documentation and visual content, as well as to prepare for (presentations) Time-consuming for the busy professional to read or an audience to take in Presentations can bore audiences if not engaging 	<ul style="list-style-type: none"> Follow conventions for organizing information according to the size of the report, audience, and purpose Augment with visuals (figures) 	<ul style="list-style-type: none"> For providing thorough business intelligence on topics important to an organization's operation For internal or external audiences For persuading audiences with well-developed arguments (e.g., recommendation reports)

7.3.1: Types of Reports: Informational and Analytical

Reports come in all shapes and sizes—from a couple of soft-copy pages shared electronically to a book-sized binder. The type of report depends on its function as expressed in the thesis or purpose statement. The function also influences the writing style and other elements such as visual content (figures) and presentation of numerical values. Reports also vary by style and tradition. Regardless of their specific function or type, however, there are two main categories of reports: informational and analytical.

An **informational report** informs or instructs and presents details of events, activities, individuals, or conditions without analysis. An example of this type of “just the facts” report is a police accident report. The report will note the time, date, place, contributing factors like weather, and identification information for the drivers involved in an automobile accident. It does not establish fault or include judgmental statements. You should not see “Driver was falling down drunk” in a police accident report. Instead, you would see “Driver failed sobriety tests and breathalyzer test and was transported to the station for a blood sample.” The police officer is not a trained medical doctor licensed to make definitive diagnoses but can collect and present relevant information that may contribute to a diagnosis.

On the other hand, an **analytical report** presents information with a comprehensive analysis to solve problems, demonstrate relationships, or make recommendations. For instance, a field report by a Public Health Agency of Canada physician from the site of an outbreak of the H1N1 virus will note symptoms, disease

progression, and steps taken to arrest the spread of the disease. It will ultimately make recommendations on the treatment and quarantine of subjects. Table 9.3 below includes common reports that, depending on the audience needs, may be informational or analytical (*Business Communication for Success*, 2015, 9.4).

Table 7.3.1: Report Types and Their Functions

Report Type	Function
1. Lab	Communicates the procedures and results of laboratory activities
2. Research	Studies problems scientifically by developing hypotheses, collecting data, analyzing data, and indicating findings or conclusions
3. Field Study	Describes one-time events, such as trips, conferences, seminars, as well as reports from branch offices, industrial and manufacturing plants
4. Incident or accident	Describes events such as accidents or altercations in the workplace to officially document them for legal and insurance purposes
5. Progress	Monitors and controls production, sales, shipping, service, or related business processes
6. Technical	Explains processes and products from a technical perspective
7. Financial	Analyzes status and trends from a finance perspective
8. Case Study	Represents, analyzes, and presents lessons learned from a specific case or example
9. Needs Assessment	Assesses the need for a service, product, project, program, or initiative
10. Comparative Advantage	Discusses competing products or services with an analysis of relative advantages and disadvantages
11. Feasibility	Analyzes problems and predicts whether current solutions or alternatives will be practical, advisable, or produce the desired outcome(s)
12. Instructional	Explains step-by-step instructions on the use of a product or service
13. Compliance	Documents and indicates the extent to which a product or service is within established compliance parameters or standards
14. Cost-benefit Analysis	Analyzes the costs and benefits of products or services, including return-on-investment considerations
15. Recommendation	Makes recommendations to management and serves as a tool to solve problems and make executive decisions
16. Benchmark	Establishes criteria and evaluates alternatives by measuring against the establish benchmark criteria
17. Examination	Reports or records data obtained from an examination of an item or conditions, including accidents and natural disasters
18. Physical Description	Describes the physical characteristics of a machine, a device, or object
19. Literature	Summarizes information available on a given topic
20. Book	Summarizes a novel or other type of book, usually as an academic exercise in secondary school or college arts program

(*Business Communication for Success*, 2015, 9.4)

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7.3.2: Report Organization

Because reports vary by size, format, and function, writing them involves adjusting to the needs of the audience while respecting conventions and guidelines. Reports are typically organized around six key elements, the 5Ws + H:

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

Pay attention to these essential elements when you consider your stakeholders, or those who have an interest in the report. That may include the person(s) the report is about, whom it is for, and the larger audience of the business, organization, or industry. Ask yourself who are the key decision makers reading the report, who the experts or technicians will be, and how executives and workers may interpret your words and images. While there is no universal format for a report, there is a common order to the information. Each element supports the main purpose or function in its own way, playing an important role in the representation and transmission of information (*Business Communication for Success*, 2015, 9.4).

Table 7.3.3: Common Report Elements

Page	Element	Function	Example
1. Outside	Letter of Transmittal	Optional cover letter that addresses the report's intended recipients and introduces it	See How to Write a Transmittal or Cover Letter (Techwriter, 2010)
2. Cover	Title and image	Gives the reader and immediate sense of what the report is all about	See Papers and Reports templates (Microsoft Office, 2014)
3. Title fly	Title only	Optional	Feasibility Study of Oil Recovery from the X Tarpit Sands Location
4. Title page	Label, report, features title, author, affiliation, date, and sometimes for whom the report was prepared		Feasibility Study of Oil Recovery from the X Tarpit Sands Location Peak Oilman, X Energy Corporation Prepared for X
5. Table of Contents	A list of the main parts of the report and their respective page numbers	Orients the reader around the scope of the report and helps them find specific information	Abstract.....1 Introduction.....2 Background.....3
6. Abstract or Executive Summary	<ul style="list-style-type: none"> • Informational abstract: highlight topic, methods, data, and results • Descriptive abstract: (All of the above without statements of conclusion or recommendations) 	Enables the reader to get a sense of the entire report at a glance to make quick decisions based on the findings	This report presents the current status of the X tarpit sands, the study of oil recoverability, and the findings of the study with specific recommendations.
7. Introduction	Introduces the topic of the report	Establishes the context in which the report topic makes sense	Oil sands recovery processes include ways to extract and separate the bitumen from the clay, sand, and water that make up the tar sands. This study analyzes the feasibility of extraction and separation, including a comprehensive cost/benefits analysis, with specific recommendations.

	Key elements of body include:		<ul style="list-style-type: none"> • Background: History of oil extraction and separation from tarpit sands • Methodology: Specific analysis of the site based on accepted research methods • Results: Data from the feasibility study • Analysis and Recommendations: Analysis of the data and recommendations based on that analysis
8. Body	<ul style="list-style-type: none"> • Background • Methodology • Results • Analysis and Recommendations 	Provides a detailed presentation of evidence	
9. Conclusion	Concise presentation of findings	Presents the main results and their relation to recommended actions or outcomes	
10. References	Bibliography or Works Cited	List of source references cited throughout	
11. Appendix	Related supporting materials	May include maps, analysis of soil samples, and field reports	

The following is a 14-point checklist for helping to ensure that a report fulfills its goals:

- ☐ 1. Report considers the audience's needs
- ☐ 2. Format follows function of report
- ☐ 3. Format reflects institutional conventions and expectations
- ☐ 4. Information is accurate, complete, and documented
- ☐ 5. Information is easy to read
- ☐ 6. Terms are clearly defined
- ☐ 7. Figures, tables, and graphic elements support written content
- ☐ 8. Figures, tables, and graphic elements are clear and correctly labeled
- ☐ 9. Figures, tables, and graphic elements are easily understood without text support
- ☐ 10. Words are easy to read (font, arrangement, organization)
- ☐ 11. Results are clear and concise
- ☐ 12. Recommendations are reasonable and well-supported
- ☐ 13. Report represents your best effort
- ☐ 14. Report speaks for itself without your clarification or explanation

(*Business Communication for Success*, 2015, 9.4)

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For more on reports, see the following resources:

- Reports, Proposals, and Technical Papers (*Purdue OWL*, 2018)
- Handbook on Report Formats (Cember, Heavilon, Seip, Shi, & Brizee, 2018)
- Writing Report Abstracts (Driscoll, 2013)

Key Takeaway



Informational and analytical reports require a clear purpose, solid organization, and adherence to conventions.

Exercises^{1.}



1. Find an annual report for a business you would like to learn more about. Write a review for it and share it with classmates.
2. Write a report on a trend in business that you've observed. For example, write a report recommending open textbooks as a solution to the rising cost of traditional textbooks being a significant issue for students.

References

Cember, E., Heavilon, A., Seip, M., Shi, L., & Brizee, A. (2018, March 23). Handbook on report formats. *Purdue OWL*. Retrieved from <https://owl.english.purdue.edu/owl/resource/726/1/>

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Microsoft Office. (2014, December 14). Papers and Reports. *Templates*. Retrieved from <https://templates.office.com/en-us/Papers-and-Reports>

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7.4: PROPOSALS

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
5. Identify the parts of effective proposals.

A proposal combines the elements of a report and a job application in that it persuasively makes a case for your product or service to a hiring company or funding organization. As a pitch for solving a problem, a proposal has much in common with recommendation reports (see #15 in Table 7.3.1 above) and is similar in form. Knowing how to write a proposal is a vital skill in business because organizations seeking services from business-to-business contractors will often put out a call for proposals to select the right contractor to perform the work. A proposal formally bids on that contract and is therefore essential to gaining work.

Proposal Topics

- 7.4.1: Purpose
- 7.4.2: Order of Parts
- 7.4.3: Ethos, Pathos, and Logos
- 7.4.4: Professionalism
- 7.4.5: Two Types of Proposals: Solicited and Unsolicited

7.4.1: Purpose

Effective business proposals are built around a great idea or solution. While you may be able to present your normal product, service, or solution in an interesting way, you want your document and its solution to stand out against the background of competing proposals. What makes your idea different or unique? How can you better meet the needs of the company than other vendors? What makes you so special? If the purchase decision

is made solely on price, it may leave you little room to underscore the value of service, but the sale follow-through has value. For example, don't consider just the upfront sticker cost of the unit but also its long-term maintenance costs. How can maintenance be a part of your solution distinct from the rest? In addition, your proposal may focus on a common product where you can anticipate several vendors at similar prices. How can you differentiate yourself from the rest by underscoring long-term relationships, demonstrated ability to deliver, or the ability to anticipate the company's needs? Business proposals need to have an attractive idea or solution to be effective (*Business Communication for Success*, 2015, 9.3).

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7.4.2: Order of Parts

You can be creative in many aspects of the business proposal, but follow the traditional categories. Businesses expect to see information in a specific order, much like a résumé or report. Each aspect of your proposal has its place and it is to your advantage to respect that tradition and use the categories effectively to highlight your product or service. Every category is an opportunity to sell, and should reinforce your credibility, your passion, and the reason why your solution is simply the best (*Business Communication for Success*, 2015, 9.3).

Table 7.4.2: Business Proposal Standard Parts

Report Type	Function
1. Cover Page	Title page with name, title, date, and specific reference to request for proposal if applicable
2. Executive Summary	Like an abstract in a report, this is a one- or two-paragraph summary of the product or service and how it meets the requirements and exceeds expectations.
3. Background	Discuss the history of your product, service, and/or company and consider focusing on the relationship between you and the potential buyer and/or similar companies.
4. Proposal	The idea. <i>Who, what, where, when, why, and how.</i> Make it clear and concise. Don't waste words and don't exaggerate. Use clear, well-supported reasoning to demonstrate your product or service.
5. Market Analysis	What currently exists in the marketplace, including competing products or services, and how does your solution compare?
6. Benefits	How will the potential buyer benefit from the product or service? Be clear, concise, and specific, as well as provide a thorough list of immediate, short-, and long-term benefits to the company.
7. Timeline	A clear presentation, often with visual aids, of the process from start to finish with specific, dated benchmarks noted.
8. Marketing Plan	Delivery is often the greatest challenge for online services—how will people learn about you? If you are bidding on a gross lot of food service supplies, this may not apply to you, but if an audience is required for success, you will need a marketing plan.
9. Budget	What are the initial costs, when can revenue be anticipated, when will there be a return on investment (if applicable)? Again, the proposal may involve a one-time fixed cost, but if the product or service is to be delivered more than once, an extended financial plan noting costs across time is required.
10. Conclusion	Like a speech or essay, restate your main points clearly. Tie them together with a common theme and make your proposal memorable.

(*Business Communication for Success*, 2015, 9.3)

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7.4.3: Ethos, Pathos, and Logos

Ethos refers to credibility, pathos to passion and enthusiasm, and logos to logic or reason. All three elements are integral parts of your business proposal that require your attention. Who are you and why should we do business with you? Your credibility may be unknown to the potential client and it is your job to reference previous clients, demonstrate order fulfillment, and clearly show that your product or service is offered by a

credible organization. By association, if your organization is credible, the product or service is often thought to be more credible.

In the same way, if you are not enthusiastic about the product or service, why should the potential client get excited? How does your solution stand out in the marketplace? Why should they consider you? Why should they continue reading? Passion and enthusiasm are not only communicated through exclamation points. Demonstrating your thorough understanding communicates dedication and interest.

Each assertion requires proof. It is not enough to make baseless claims about your product or service; you have to show why the claims you make are true, relevant, and support your central assertion that your product or service is right for this client. Make sure you cite sources and indicate “according to” when you support your points. Be detailed and specific (*Business Communication for Success*, 2015, 9.3).

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7.4.4: Professionalism

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

Effective, persuasive proposals are often brief, even limited to one page. “The one-page proposal has been one of the keys to my business success, and it can be invaluable to you too. Few decision-makers can ever afford to read more than one page when deciding if they are interested in a deal or not. This is even more true for people of a different culture or language,” said Adnan Khashoggi, a successful multibillionaire (Riley, 2002, p. 2). Clear and concise proposals serve the audience well and limit the range of information to prevent confusion (*Business Communication for Success*, 2015, 9.3).

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7.4.5: Two Types of Proposals: Solicited and Unsolicited

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

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

Unsolicited proposals are the “cold calls” of business writing. They require a thorough understanding of the market, product and/or service, and their presentation is typically general rather than customer-specific. They can be tailored to specific businesses with time and effort, however, and the demonstrated knowledge of specific needs or requirement can transform an otherwise generic, brochure-like proposal into an effective sales message.

Getting your tailored message to your target audience can often be a significant challenge if it has not been directly or indirectly solicited. Unsolicited proposals are often regarded as marketing materials intended more to stimulate interest for a follow-up contact than make direct sales. Throwing everything you’ve got at a wall and hoping something sticks isn’t the best way to generate work. A targeted proposal is your most effective approach, but recognize the importance of gaining company, service, or brand awareness, as well as its limitations (*Business Communication for Success*, 2015, 9.3).

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For more on proposals, see the following resources:

- Reports, Proposals, and Technical Papers (Purdue OWL, 2018)
- Planning and Organizing Proposals and Technical Reports (Johnson-Sheehan, 2008)
- Sample Business Proposal (Writing Help Central, 2009)

Key Takeaway



Business proposals target a specific audience.

Exercise



Locate an RFP (request for proposal) or similar call to bid related to the career you're training for. Prepare a two-page mock business proposal for it. (Do not include actual contact information; make it all up for the purposes of the assignment.)

References

Johnson-Sheehan, R. (2008, June 28). Planning and organizing proposals and technical reports [PDF File]. *Purdue OWL*. Retrieved from https://owl.english.purdue.edu/media/pdf/20080628094326_727.pdf

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CHAPTER 8: ROUTINE MESSAGES

Jordan Smith

Chapter Learning Objectives

1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Write routine message types such as information shares, requests, and replies; complaints and claims; and recommendation and goodwill messages/
3. Organize and write persuasive messages.
4. Organize and write negative message.

The vast majority of the couple hundred billion business emails sent every day (see §6.1 above) are short messages of a routine nature such as asking for and sharing information, requesting action, or thanking someone for something given. Most of the time these are positive or neutral messages even when they involve small complaints or claims where you request that an error be corrected. These are all direct-approach messages where the main idea comes right upfront and details follow. Occasionally, you must communicate bad news in writing, which requires a more careful, indirect approach. All of these situations involve conventions that business professionals follow to minimize miscommunication and its fallout, and thus keep their operation running smoothly. In this chapter, we continue our applied-writing unit by examining the conventions for the following everyday message types:

- 8.1: Information Shares, Action Requests, and Replies
- 8.2: Complaints and Claims
- 8.3: Negative Messages
- 8.4: Persuasive Messages
- 8.5: Goodwill Messages and Recommendations

8.1: INFORMATION SHARES, ACTION REQUESTS, AND REPLIES

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Write routine message types such as information shares, requests, and replies.

Ask any professional what kinds of messages they spend the majority of their sit-down time at a computer writing and responding to. They will likely tell you that they're requesting information or action and replying to those with answers or acknowledgements. Though you've probably written many of these yourself, you may need to polish your style and organization to meet a professional standard. After all, the quality of the responses you get or can give crucially depends on the quality of the questions you ask or are asked. Let's look at several such scenarios in detail.

Information Shares, Action Requests, and Replies Topics

- 8.1.1: Information Shares
- 8.1.2: Information or Action Requests
- 8.1.3: Replies to Information or Action Requests

8.1.1: Information Shares

Perhaps the simplest and most common routine message type is where the sender offers up information that helps the receiver. These may not be official memos, but they follow the same structure, as shown in Table 8.1.1 below.

Table 8.1.1: Outline for Information Shares

Outline	Content	Example Message
1. Opening	Main point of information	Hi Karin, I just saw a CFP for a new funding opportunity you can apply for via the Ministry of Agriculture.
2. Body	Information context and further details	Find it on the Greenbelt Fund’s Local Food Literacy Grant Stream page. If you haven’t already been doing this, you should also check out the Ministry’s general page on Funding Programs and Support to connect with any other grants etc. relevant to the good work you do.
3. Closing	Action regarding the information	It looks like the deadline for proposals is at the end of the week, though, so you might want to get on it right away. Good luck! Shradha

Notice here how the writer made the reader’s job especially easy by providing links to the recommended webpages using the hyperlinking feature (*Ctrl.* + *K*) in their email.

Replies to such information shares involve either a quick and concise thank-you message (see §8.5.2 below) or carry the conversation on if it’s part of an ongoing project, initiative, or conversation. Recall that you should change the email subject line as the topic evolves (see §6.1.3 above). Information shares to a large group, such as a departmental memo to 60 employees, don’t usually require acknowledgement. If everyone wrote the sender just to say thanks, the barrage of reply notifications would frustrate them as they try to carry on their work while sorting out replies with valuable information from mere acknowledgments. Only respond if you have valuable information to share with all the recipients or just the sender.

Return to the Information Shares, Action Requests, and Replies Topics menu

8.1.2: Information or Action Requests

Managers, clients, and coworkers alike send and receive requests for information and action all day. Because these provide the recipient with direction on what to do, the information that comes back or action that results from such requests can only be as good as the instructions given. Such messages must therefore be well organized and clear about expectations, opening directly with a clearly stated general request (see §4.1.1 on direct-approach messages)—unless you anticipate resistance to the request (see §4.1.2 on indirect-approach messages)—and proceeding with background and more detailed instruction if necessary as we see in Table 8.1.2 below.

Table 8.1.2: Outline for Direct Information or Action Requests

Outline	Content	Example Message
Subject Line	3- to 7-word title	Website update needed by Monday
1. Opening	Main question or action request	Hello, Mohamed: Could you please update the website by adding the new hires to the Personnel page. We've hired three new associates in the past few weeks. With the contents of the attached folder that contains their bios and hi-res pics, please do the following:
2. Body	Information or action request context, plus further details	<ol style="list-style-type: none"> 1. Proof the bios using Track Changes and send them to me. 2. Post the proofed bios on the site right away and call me as soon as they're up. I'm sure your edits will be fine, but I'd like to just quickly read them and suggest further edits over the phone if need be since time is of the essence here. 3. Downsize the pics to 72dpi and crop them so they're the same dimensions as the other portraits on that page before posting them along with the bios.
3. Closing	Deadlines and/or submission details	Sorry for the short notice, but could we have this update all wrapped up by Monday? We're meeting with some investors early next week and we'd like the site to be fully up to date by then. Much appreciated! Sylvia

Note that, because you're expecting action to come of the request rather than a Yes or No answer, the opening question doesn't require a question mark (see §5.3.10 above). Never forget, however, the importance of saying "please" when asking someone to do something (see §4.5.2.5 above for more on courteous language). Notice also that lists in the message body help break up dense detail so that request messages are more reader-friendly (see §4.6.5 above). All of the efforts that the writer of the above message made to deliver a reader-friendly message will pay off when the recipient performs the requested procedure exactly according to these clearly worded expectations.

8.1.2.1: Instructional Messages

Effective organization and style are critical in requests for action that contain detailed instructions. Whether

you're explaining how to operate equipment, apply for funding, renew a membership, or submit a payment, the recipient's success depends on the quality of the instruction. Vagueness and a lack of detail can result in confusion, mistakes, and requests for clarification. Too much detail can result in frustration, skimming, and possibly missing key information. Profiling the audience and gauging their level of knowledge is key (see §2.2.4 above on analyzing your audience) to providing the appropriate level of detail for the desired results.

Look at any assembly manual and you'll see that the quality of its readability depends on the instructions being organized in a numbered list of parallel imperative sentences. As opposed to the indicative sentences that have a grammatical subject and predicate (like most sentences you see here), imperative sentences drop the subject (the doer of the action, which is assumed to be the reader in the case of instructions). This omission leaves just the predicate, which means that the sentence starts with a verb (see #2 in Table 4.3.1 on the four sentence moods for more on imperative sentences). In Table 8.1.2.1 below, for instance, the reader can easily follow the directions by seeing each of the six main steps open with a simple verb describing a common computer operation: Copy, Open, Type, Paste (twice), and Find.

If you begin any imperative sentence with a prepositional (or other) phrase to establish some context for the action first (such as this imperative sentence does), move the adverb after the verb and the phrase to the end of the sentence. (If the previous sentence followed its own advice, it would look like this: Move the adverb after the verb and the phrase to the end of the imperative sentence if you begin it with a prepositional (or other) phrase to establish some context for the action first.) Finally, surround the list with a proper introduction and closing as shown in Table 8.1.2.1 below.

Table 8.1.2.1: Outline for Instructional Messages

Subject Line	Content	Example Email Message
Subject Line	Procedure name	How to find an undated webpage date Hi team,
1. Opening	Reader benefits	Would you like to learn a nifty little hack that can help you find information you need for properly crediting your sources? Please find below instructions for how to discover the date that a webpage was posted or last updated if it doesn't say so itself.
2. Context	Context for the procedure	Sometimes you need to know when exactly a webpage was posted or updated, but it either doesn't say or has a copyright notice at the bottom with the present year, and you know it was posted years ago, so that's not accurate. Rather than indicate "n.d." (for "no date") when citing and referencing a source in APA style, you can instead find out the actual date with a clever little trick. To find the exact date that the webpage was posted or last updated, please follow the procedure below in your Google Chrome browser:
3. Instructions	Introductory clause and numbered list, each with an imperative sentence (beginning with a verb)	<ol style="list-style-type: none"> 1. Copy the entire URL (web address) of the webpage you would like to find the date for by keying <i>Alt.</i> + <i>D</i> and <i>Ctrl.</i> + <i>C</i>. 2. Open up a new tab in the Google Chrome browser. 3. Type "inurl:" in the "Search Google or type URL" field in the middle of the page. 4. Paste (<i>Ctrl.</i> + <i>V</i>) the webpage URL immediately after "inurl:" (with no space between them) and hit the <i>Enter</i> (or <i>Return</i>) key; the web address will move up into the address bar and, after hitting <i>Enter</i>, you will see a list of search results, the top result of which should be the webpage you're looking for. 5. Paste <code>&as_qdr=y15</code> at the very end of the search results page web address with no space between the URL and the above code, then hit the <i>Enter</i> key again. 6. Find the date in grey text on the third line of the first result of the new search results page, just below the title of the page in purple on the first line and URL in green on the second. 7. Adjust the controls (e.g., the date range so that it starts at a date earlier than 15 years ago) above if the results page says "Your search – [URL] – did not match any documents."

4. Closing	Specific action request, closing thought, summary, or deadline with a reason	<p>If you encounter a webpage where this hack doesn't work at all, go with the year given in the copyright notice at the bottom or "n.d." in your citation and reference if it doesn't even have a copyright year.</p> <p>Good luck, Nolan</p>
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Though helpful on its own, the above message would be much improved if it included illustrative screenshots at each step. Making a short video of the procedure, posting it to YouTube, and adding the link to the message would be even more effective.

Combining *DOs* and *DON'Ts* is an effective way to help your audience complete the instructed task without making common rookie mistakes. Always begin with the *DOs* after explaining the benefits or rewards of following a procedure, not with threats and heavy-handed Thou shalt nots. Most people are better motivated by chasing the carrot than fleeing the stick (see §4.5.2.5.2 above and §11.1.3.2 below). You can certainly follow up with helpful *DON'Ts* and consequences if necessary, but phrased in courteous language, such as “For your safety, please avoid operating the machinery when not 100% alert or you may risk dismemberment.”

8.1.2.2: Indirect Information or Action Requests

If you expect resistance to your request because you're asking a lot of someone, perhaps because you know what you're asking goes against company policy, an indirect approach is more effective (see §4.1.2 on indirect message organization). Ideally, you'll make such persuasive pitches in person or on the phone so that you can use a full range of verbal and non-verbal cues (see §8.4 below on persuasive messages). When it's important to have them in writing, however, such requests should be clear and easy to spot, but buffered by goodwill statements and reasonable justifications, as shown in Table 8.1.2.2 below.

Table 8.1.2.2: Outline for Indirect Information or Action Requests

Outline	Content	Example Message
Subject Line	Strategically vague	Furnace repair needed Hello Mike,
1. Opening	Buffer pleasantries	We've been nothing but impressed by the furnace and air conditioner installed by Redmond Heating & Air five years ago. We've recommended you to several friends because of your exceptional customer service.
2. Context	Background justification	A few days ago, however, our furnace suddenly stopped working. It's a bit of a mystery because we've been changing the filter regularly every month for the past five years and had you in here for regular check-ups every year, as per the terms of the warranty. When we checked the warranty, however, we saw that it expired a week ago. Talk about bad timing!
3. Main point	Information or action request, to which you will expect some resistance	Given that we've been such responsible and loyal customers, and that we've sent business your way a few times, we're wondering if we can still get you out here to repair the furnace under the terms of the warranty. Can we pretend that it's expiring next week instead of last week?
4. Closing	Deadlines and/or implementation details	I know this must be a busy time for you and we're asking a lot already, but since it's starting to drop below zero outside and probably won't take long to do the same inside here, could you please come as soon as possible. We'd be forever in your debt if you could help us out here! Many thanks, Belinda

[Return to the Information Shares, Action Requests, and Replies Topics menu](#)

8.1.3: Replies to Information or Action Requests

When responding to information or action requests, simply deliver the needed information or confirm that the action has been or will be completed unless you have good reasons for refusing (see §8.3 below on negative messages). Stylistically, such responses should follow the 6 Cs of effective business style (see §4.5.2 above), especially courtesies such as prioritizing the “you” view (§4.5.2.5.1), audience benefits (§4.5.2.5.2), and saying “please” for follow-up action requests (§4.5.2.5). Such messages are opportunities to promote your company’s products and services. Ensure the accuracy of all details, however, because courts will consider them legally

binding, even in an email, if disputes arise—as the Vancouver Canucks organization discovered in a battle with Canon (Smith, 2015). Manager approval may therefore be necessary before sending. Organizationally, a positive response to an information request delivers the main answer in the opening, proceeds to give more detail in the body if necessary, and ends politely with appreciation and goodwill statements, as shown in Table 8.1.3 below.

Table 8.1.3: Outline for Positive Replies to Information or Action Requests

Outline	Content	Example Message
Subject Line	3- to 7-word title	Re: Accommodation and conference rooms for 250 guests Greetings, Mr. Prendergast:
1. Opening	Main information or action confirmation	Thank you so much for choosing the Vancouver Marriott for your spring 2020 sales conference. We would be thrilled to accommodate 250 guests and set aside four conference rooms next May 25 through 29. In answer to your other questions:
2. Body	Further details	<ul style="list-style-type: none"> • Yes, all 250 of your guests can dine together in our Nootka Banquet Hall in a variety of table configurations to suit your needs. • Certainly, you can choose from among six conference rooms with 100-seat capacities, as well as a variety of other smaller rooms. Each has a large screen with a podium equipped with an audio-visual presentation console; presenters can either plug their USBs into the Windows-based console computer or connect their laptops with the HDMI cable. • Every guest suite has wifi and each of our hotel's 30 floors has a business lounge equipped with 10 computer work stations (5 PCs and 5 Macs), multifunctional phone/faxes, and printer/copiers. • Yes, we have a fleet of five shuttles that can transport 10 guests (plus luggage) at a time from the airport as flights arrive and back as they depart. <p>You can visit our website at www.vancouvermarriott.com for additional information about our facilities such as gyms, a spa, and both indoor and outdoor swimming pools. Call us at 1-604-555-8400 if you have additional questions.</p>
3. Closing	Deadlines and/or action details	<p>Please book online as soon as possible to ensure that all 250 guests can be accommodated during your preferred date range. For such a large booking, we encourage you to call also during the booking process.</p> <p>Again, we are very grateful that you are considering the Vancouver Marriott for your conference.</p> <p>We look forward to making your stay memorable.</p> <p>Rufus Killarney, Booking Manager Vancouver Hilton</p>

Return to the Information Shares, Action Requests, and Replies Topics menu

Key Takeaway



Follow best practices when sharing information, requesting information or action, and replying to such messages.

Exercises



Pick a partner and email them a set of instructions following the message outline template and example given in Table 8.1.2.1. It must be a procedure with at least five steps and is familiar to you (e.g., how to prepare your favourite drink) but unfamiliar to them. Can they follow your procedure and get the results you desire?

References

Smith, C. L. (2015, May 8). Canada: When does an email form a legally-binding agreement? Ask the Canucks. Retrieved from <http://www.mondaq.com/canada/x/395584/Contract+Law/When+Does+An+Email+Form+A+LegallyBinding+Agreement+Ask+The+Canucks>

8.2: COMPLAINTS AND CLAIMS

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Write routine message types such as information shares, requests, and replies.

Business doesn't always go smoothly. Customers can be disappointed with a faulty product or poor service; shipments might get damaged on route, lost, or arrive late; or one business might infringe on the rights and freedoms of another. In all such cases, the offended party's responsibility is to make the offending party aware of what went wrong and what they want done about it. Indeed, it's their consumer right to do so and the business or organization receiving such a message should take it as valuable intelligence on customer expectations that must be met for the operation to be viable.

A **claim** explains what went wrong and demands compensation from the offending party, whereas a **complaint** explains what went wrong and merely demands correction or apology. Minor complaints are best communicated in person, on the phone, or by email (if it's important to have them in writing) so they can be dealt with quickly. More serious complaints or claims are delivered as formal letters to lay down a paper trail in case they need to be used as evidence in a lawsuit.

Though some believe that a strongly worded complaint or claim is an effective way of getting what they want, you can catch more flies with honey than with vinegar (Michael, 2007, #3). In other words, if you are nice about communicating your problem with a situation or business transaction, the customer service representative (CSR) or manager dealing with it is more likely to give you what you want. Just because some customers have found success bullying people who are only trying to do their jobs, not all such attempts will likewise succeed, nor is it right from a moral standpoint, especially when the abused CSR had nothing to do with the complaint.

Ineffective complaints or claims often merely vent frustrations, issue threats, don't say what they want or only vaguely imply it, or demand completely unreasonable compensation. Demanding a lifetime supply of milk from your grocery store because one carton happened to be rotten will result in nothing because the

manager or CSR will dismiss it altogether as being ridiculous opportunism. Threatening to shop elsewhere makes you sound like a lost cause and therefore not worth losing any more time or money on. Since such messages are usually aggressive (or passive-aggressive) in tone and therefore rude and offensive, the recipient may respond aggressively in turn, give the complainant much less than what they asked for (e.g., a mere apology rather than compensation or replacement), or ignore the complaint altogether. Often the reader of such messages is not the one at fault, so a hostile message would be especially ineffective and possibly even actionable in extreme cases—i.e., liable to cause damages that the recipient could pursue compensation for in court.

Assume that a business will take your complaint or claim seriously if it's done right because, no matter what the industry, companies are rightly afraid of losing business to negative online reviews. According to one study, even one negative review can cost a business 22% of customers and three negative reviews 59% (Arevalo, 2017). One mother's endorsement or warning to others about a local store in a local moms group on Facebook could make or break that business. Even worse, complaints aired on Facebook or Twitter, shared widely to the point of going viral, and picked up by news outlets can destroy all but the too-big-to-fail companies or at least to serious damage to their brand. In this age of social media, good customer service is crucial to business survivability. A complaint provides a business with both valuable information about customer expectations and an opportunity to win back a customer—as well as their social network if a good endorsement comes of it from the now-satisfied customer—or else risk losing much more than just the one customer.

Effective complaints or claims are politely worded and motivated by a desire to right wrongs and save the business relationship. They're best if they remind the business that you've been a loyal customer (if that's true) and really want to keep coming back, but you need them to prove that they value your business after whatever setback prompted the complaint. If the writer of such messages plays their cards right, they can end up getting more than they originally bargained for.

Complaints and Claims Topics

- 8.2.1: Complaint or Claim Message Organization
- 8.2.2: Replying to Complaints or Claims

8.2.1: Complaint or Claim Message Organization

Complaints and claims take the direct approach of message organization even though they arise from dissatisfaction. They follow the usual three-part message organization we've seen before (see §4.1 and §6.1.5 – §6.1.7 above):

1. **Opening:** To be effective at writing a complaint or claim, be clear, precise, and polite about what you want in the opening. If you want financial compensation or a replacement product in the case of a claim,

be clear about the amount or model. You could also suggest equivalent or alternative compensation if you stand a poor chance of getting exactly what you want. If you want an error corrected or an apology in response to your complaint, be upfront about it.

2. **Body:** The message body justifies the request with a narrative account of what should have happened versus what actually happened instead. Be objective in writing the account because an angry tone coming through in negative words, accusations, and exaggerations will only undermine the validity of your complaint or claim. Be precise in such details as names, dates and times, locations (addresses), and product names and numbers. Wherever possible, provide and refer to evidence. For instance, you may include copies (definitely not originals) of documentation such as receipts, invoices, work orders, bills of lading, emails (printed), phone records, photographic evidence, and even video (e.g., of a damaged product).
3. **Closing:** No matter what prompted the complaint or claim, the closing must be politely worded with action requests (e.g., a deadline) and goodwill statements. Nasty parting shots, even if merely passive-aggressive, may lower your chances of getting what you're asking for. By complimenting the recipient's company however, you up your chances of getting not only what you wanted, but perhaps a little extra. In damage-control mode, the business wants you to feel compelled to tell your friends that the company really turned it around.

Table 8.2.1: Outline for Complaints or Claims

Outline	Content	Example Message
Subject Line	3- to 7-word title	Refund for unwanted warranty purchase
1. Opening	Main action request	Greetings: Please refund me for the \$89.99 extended warranty that was charged to my Visa despite being declined at the point of sale.
2. Body	Narrative of events justifying the claim or complaint	This past Tuesday (June 12), I purchased an Acer laptop at the Belleville location of Future Shock Computers and was asked by the sales rep if I would like to add a 3-year extended warranty to the purchase. I declined and we proceeded with the sale, which included some other accessories. When I got home and reviewed the receipt (please find the PDF scan attached), I noticed the warranty that I had declined was added to the bill after all.
3. Closing	Deadlines and/or submission details	Please refund the cost of the warranty to the Visa account associated with the purchase by the end of the week and let me know when you've done so. I have enjoyed shopping at Future Shock for the great prices and customer service. I would sincerely like to return to purchase a printer soon. Much appreciated! Samantha

Notice that the final point in the closing suggests to the store manager that they have an opportunity to continue the business relationship if all goes well with the correction. The implication is that a special deal on the printer will smooth things over.

Return to the Complaints and Claims Topics menu

8.2.2: Replying to Complaints or Claims

If a company grants what the complainant or claimant has asked for, communicating this is called an **adjustment** message. An adjustment letter or email is heavy on courtesy in letting the disappointed customer know that they are valued and will be (or have already been) awarded what they were asking for, and possibly even a little extra. In the case of coupons for discounts on future purchases, the little extras help smooth things over and win back the customer's confidence, hopefully so they will tell their friends that the store or company is worthy of their business after all.

8.2.2.1: Adjustment Message Organization

An adjustment message takes the direct approach by immediately delivering the good news about granting the claimant's request. Though you would probably start with an apology if this situation arose in person, starting on a purely positive note is more effective in a written message. Tone is also important here; resist the urge to shame the customer—even if they're partly to blame or if part of you still suspects that the claim is fraudulent—with begrudging, passive-aggressive shade. If you're going to grant the claim, write it wholeheartedly as if others will be able to see it and judge whether your company has good customer service or if you're going to be jerks about it.

Though a routine adjustment letter might skip a message body, a more serious one may need to go into more detail about how you are complying with the request or take the time to explain what your company is doing to prevent the error again. Doing this makes the reader feel as though making the effort to write will have made a positive impact in the world, however small, because it will benefit not only you, but also everyone else who won't have to go through what you did. Even if you have to explain how the customer can avoid this situation in the future (e.g., by using the product or service as it was intended), putting the responsibility partly on their shoulders, do so in entirely positive terms (see §4.5.2.3.3 on using positive language and a list of negative words to avoid). An apology might also be appropriate in the message body (see §8.2.2.2 below).

Table 8.2.2: Outline for Adjustment Messages Replying to Complaints and Claims

Outline	Content	Example Message
Subject Line	Identify the previous subject line	Re: Refund for unwanted warranty purchase
1. Opening	Main point about granting the request	<p>Hello, Samantha:</p> <p>Absolutely, we would be happy to refund you for the \$90 warranty mistakenly charged along with your purchase of the Acer laptop. For your inconvenience, we will also offer you a \$20 gift card for future purchases at our store.</p> <p>To receive your refund and gift card, please return to our Belleville location with your receipt and the credit card you purchased the computer with so that we can credit the same card \$90. (For consumer protection reasons, we are unable to complete any transactions without the card.)</p>
2. Body	Details of compliance and/or assurances of improved process	<p>We are sorry for inconveniencing you and will speak with all sales staff about the importance of carefully checking the accuracy of any bill of sale before sending the order for payment. To ensure that this doesn't happen again, we will also instruct sales staff to confirm with customers whether an extended warranty appearing on the sales bill is there with consent before completing any transaction.</p> <p>We appreciate your choosing Future Shock for your personal electronics and look forward to seeing you soon to credit your Visa card and provide you with the best deal in town on the printer you were looking to purchase.</p>
3. Closing	Courteous statements expressing confidence in future business relations	<p>Have a great day!</p> <p>Melissa</p>

Of course, not all complaints or claims deserve an adjustment, so we will examine how to write those effectively in §8.3.2 below.

8.2.2.2: Apologizing

Apologizing is tricky because it is essential to winning back customer confidence in some situations, but also leaves you or your company open to legal action in others. For minor matters, admitting fault with an apology usually helps vindicate or validate the customer. In more serious matters, especially involving injury or damage to property or even someone's reputation (and thus their earning potential), a written apology might be read as

admitting fault and be used as evidence in court. For this reason, it's best to ask a manager or legal department for guidance on apologizing to a customer or other stakeholder in writing.

If apologizing is appropriate because you genuinely erred, no legal repercussions are expected, and it's the right thing to do when trying to soothe an angry response and mend a damaged business relationship, ensure that the apology has the following four characteristics:

- **Sincere:** Saying “We are genuinely sorry that you were disappointed with the customer service experience” is a good first step, but requires some additional assurances to prove it.
- **Responsible:** Own the error by admitting fault (again, only if it doesn't open you to litigation). Say what should have happened versus what actually happened and acknowledge that you were wrong. When former Toronto mayor Rob Ford apologized for his behaviour in November 2013, for instance, it sounded like this: “That was pure stupidity. I shouldn't have got hammered down at the Danforth. If you're going to have a couple drinks you stay home, and that's it. You don't make a public spectacle of yourself” (“Some memorable Rob Ford quotes,” 2016).
- **Specific:** To be sincere, an apology must refer to a specific error by briefly describing it, possibly including dates, locations (see the Ford example above), and the names of people responsible or affected, if appropriate. The worst apologies are blanket, generic statements such as “We're sorry if anyone was offended by our actions.”
- **Improvement-focused:** An apology is useless unless it includes some assurances that the error won't happen again. Simply saying it won't happen again isn't as convincing as describing what will be done to ensure that it won't, as well as following through on it. When Starbucks apologized for a racist incident at one of its locations in 2018, for instance, it followed through on a plan for improving customer service by shutting down all of its stores for a half-day so that employees could receive racial sensitivity training (Dangerfield, 2018).

Apologizing may even be necessary when you're not really in the wrong, but the customer's or public's perception is that you are. In crisis communications (see §8.3.4 below), effective apologies show that you care enough about your existing and potential clientele to say and do what it takes to win back their trust and confidence in you. You can do this without falsely claiming that you made an error (if you genuinely didn't) by saying that you apologize for the misunderstanding. Dismissing complaints and doubling down on an error, on the other hand, shows a brazen disrespect for the people your success depends on.

Return to the Complaints and Claims Topics menu

Key Takeaway



When something goes wrong in a commercial situation, courteous communication is essential when both asking for and responding to complaints and claims.

Exercises



1. If you've ever felt mistreated or taken advantage in a business transaction but did nothing about it, write a complaint or claim letter asking that the company correct the wrong following the guidance in §8.2.1 above. You don't need to actually send it, but do so if you feel strongly about it and feel as though you have a reasonable chance at success.
2. Put yourself in the shoes of the company that you wrote to in the previous exercise. Write a response to your message following the advice in §8.2.2 above.

References

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8.3: NEGATIVE MESSAGES

Learning Objectives



3. Organize and write negative messages.

Just as in life, the workplace isn't always a bowl of cherries. Sometimes things don't go according to plan, and it's your job to communicate about them in a way that doesn't ruin your relationships with customers, coworkers, managers, the public, and other stakeholders. When doing damage control, bad-news messages require care and skillful language because your main point will meet resistance. Rarely are people okay being told that they're laid off, their application has been rejected, their shipment got lost en route, prices or rates are increasing, their appointment has to be moved back several months, or they're losing their benefits. Though some people prefer that the messenger be blunt about it, in most cases you can assume that the receiver will appreciate or even benefit by a more tactful, indirect approach. Keep in mind the following advice whenever required to deliver unwelcome news.

Negative Messages Topics

- 8.3.1: The Seven Goals of Bad-news Messages
- 8.3.2: Indirect Bad-news Message Organization
- 8.3.3: Avoiding Disaster in Bad-news Messages
- 8.3.4: Crisis Communications
- 8.3.5: Direct Approach Bad-news Messages

8.3.1: The Seven Goals of Bad-news Messages

Your ability to manage, clarify, and guide understanding is key to addressing challenging situations while maintaining trust and integrity with customers, coworkers, managers, the public, and other stakeholders. Keep in mind these seven goals when delivering bad news in person or in writing:

1. Be clear and concise to avoid being asked for additional clarification.
2. Help the receiver understand and accept the news.

3. Reduce the anxiety associated with the bad news as much as possible by expressing sympathy or empathy.
4. Maintain trust and respect between you and your audience to ensure the possibility of good future relations.
5. Deliver the bad news in a timely fashion in the appropriate channel(s).
6. Avoid the legal liability that comes with admitting negligence or guilt.
7. Achieve the designated business outcome.

Let's look at how we can achieve these goals in examples of the tricky situations in which we might find ourselves in the workplace.

Let's say you are a supervisor and your manager has tasked you with getting Chris, an employee who is usually late for work and has been arriving even later recently, to start arriving on time. Chris's tardiness is impairing not only his performance but also that of the entire team that depends on his work. You figure there are four ways you can handle this:

1. Stop by Chris's cubicle and simply say, "Get to work on time or you're out"
2. Invite Chris out to a nice lunch and let him have it
3. Write Chris a stern email
4. Ask Chris to come to your office and discuss the behaviour with him in private

Let's see how each of these alternatives meets our seven goals in delivering bad news.

First, if you approach Chris with a blunt ultimatum at his desk, you can get right to the point there but risk straining the supervisor-employee relationship by putting him in his place in front of everyone. The aggressive approach might prompt Chris to demand clarification, make defensive excuses, or throw hostile counter-offensives right back—none of which are desired outcomes. For that matter, the disrespectful approach doesn't formally confirm that the tardiness will end. The lack of tact in the approach may reflect poorly on you as the supervisor, not only with Chris but with your manager as well.

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

Let's say you invite Chris to lunch at a nice restaurant. He sees the fine linen on the table, silverware for more than the main course, and water glasses with stems. The luxurious environment says "good job," but your serious talk will contradict this nonverbal signage, which will probably be an obstacle to Chris's ability to

listen. If Chris doesn't understand and accept the message, requiring him to seek clarification, your approach has failed. Furthermore, the ambush fails to build trust, so you don't know whether Chris is going to make the extra effort to arrive early or just put in his time there doing the bare minimum while looking for another job.

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

You ask Chris to join you in a private conversation. You start by expressing concern and asking an open-ended question: "Chris, I've been concerned about your work lately. Is everything all right?" As Chris answers, you may demonstrate that you are listening by nodding your head and possibly taking notes. You may learn that Chris has been having problems sleeping or that his living situation has changed. Or Chris may decline to share any issues, deny that anything is wrong, and ask why you are concerned. You may then state that you've observed the chronic tardiness and name one or more specific mistakes you have found in Chris's work, ending by repeating your concern. Because showing your concern makes Chris feel valued, he opens up about his situation so that you understand where he's coming from. It may turn out that he has to drop his kids off for school at 8am and then contend with Queensway traffic for the next hour to get to the office, consistently making him a half hour late. You can then both agree that he'll stay a little later or put in the missing hours at home, then write up that agreement in an email with your manager Cc'd.

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

One additional point to consider as you document this interaction is the need to present the warning in writing. You may elect to prepare a memo that outlines the information concerning Chris's performance and tardiness and have it ready should you want to present it. If the session goes well, and you have the discretion to make a judgment call, you may elect to give him another week to resolve the issue. Even if it goes well, you may want to present the memo, as it documents the interaction and serves as evidence of due process should Chris's behaviour fail to change, eventually resulting in the need for termination. This combined approach of a verbal and written message is increasingly the norm in business communication (Business Communication for Success, 2015, 17.1).

[Return to the Negative Messages Topics menu](#)

8.3.2: Indirect Bad-news Message Organization

Key to achieving Goal #2 of delivering bad news—i.e., helping the receiver understand and accept information they don’t want to hear or read—is organizing the message using the indirect approach described in §4.1.2 above. If you tactlessly hit your audience over the head with really bad news, you run the risk of them rejecting or misunderstanding it because they may be reeling from the blow and be too distracted with anger or sadness to rationally process the explanation or instructions for what to do about the bad news. A doctor never delivers a really serious diagnosis by coming right out and saying “You have cancer!” first thing. Instead, they try to put a positive spin on the results (“It could be worse”), discuss test results in detail, talk about treatment options, and only then come around to telling the patient the bad news. At that point, being clear about the bad news ensures that the receiver understands the gravity of the situation and is therefore motivated to follow through on the therapeutic recommendations given earlier. Key to avoiding misunderstandings when delivering bad news, then, is the following four-part organization:

- 1. Buffer
- 2. Justification
- 3. Bad news + redirection
- 4. Positive action closing

This is much like the three-part structure we’ve seen before in §4.1, only the body is now divided into two distinct parts where the order really matters, as we see in Table 8.3.2 and the explanation for each part below it.

Table 8.3.2: Bad News Message Outline and Example Message

Part	Example Message
1. Buffer	Thank you for your order. We appreciate your interest in our product and are confident you will love it.
2. Explanation	We are writing to let you know that this product has been unexpectedly popular with over 10,000 orders submitted on the day you placed yours.
3. Bad news + redirect	This unexpected increase in demand has resulted in a temporary out-of-stock/backorder situation. Despite a delay of 2-3 weeks, we will definitely fulfill your order as it was received at 11:57pm on October 9, 2018, as well as gift you a \$5 coupon towards your next purchase.
4. Positive action closing	While you wait for your product to ship, we encourage you to use the enclosed \$5 coupon toward the purchase of any product in our online catalog. We appreciate your continued business and want you to know that our highest priority is your satisfaction.

(Business Communication for Success, 2015, 17.1)

8.3.2.1: Bad-news Message Buffer

Begin with neutral or positive statements that set a welcoming tone and serve as a **buffer** for the information to come. A buffer softens the blow of bad news like the airbag in a car softens the driver's collision with the steering wheel in a high-speed car accident. If there are any silver linings that can calm the poor person about to be pummeled by the dark thunder clouds of bad news, here at the beginning would be a good time to point them out. The following are some possible buffer strategies:

- **Good news:** If there's good news and bad news, start with the good news.
- **Compliment:** If you're rejecting someone's application, for instance, start by complimenting them on their efforts and other specific accomplishments you were impressed by in their application.
- **Gratitude:** Say thanks for whatever positive things the recipient has done in your dealings with them. If they've submitted a claim that doesn't qualify for an adjustment, for instance, thank them for choosing your company.
- **Agreement:** Before delivering bad news that you're sure the recipient is going to disagree with and oppose, start with something you're sure you both agree on. Start on common ground by saying, "We can all agree that"
- **Facts:** If positives are hard to come by in a situation, getting started on the next section's explanation, starting with cold, hard facts, is the next best thing.
- **Understanding:** Again, if there are no silver linings to point to, showing you care by expressing sympathy and understanding is a possible alternative (Guffey et al. 2016, p. 194)
- **Apology:** If you're at fault for any aspect of a bad news message, an apology is appropriate as long as it won't leave you at a disadvantage in legal proceedings that may follow as a result of admitting wrongdoing. (See §8.2.2.2 above for more on effective strategies for apologizing.)

The idea here is not to fool the audience into thinking that only good news is coming but to put them in a receptive frame of mind for understanding the explanation that follows. If you raise the expectation that they're going to hear the good news that they're getting what they want only, to let them down near the end, they're going to be even more disappointed for being led on. If you hit them over the head with bad news right away, however, they may be more distracted with emotion to rationally process the explanation or instructions for what to do about the bad news.

8.3.2.2: Bad-news Justification

The **justification** explains the background or context for the bad news before delivering the bad news itself. Let's say that you must reject an application, claim for a refund, or request for information. In such cases, the explanation could describe the strict acceptance criteria and high quality of applications received in the competition, the company policy on refunds, or its policy on allowable disclosures and the legalities of contractually obligated confidentiality, respectively. Your goal with the explanation is to be convincing so that the reader says, "That sounds reasonable" and similarly accepts the bad news as inevitable given the situation you describe. On the other hand, if you make the bad news seem like mysterious and arbitrary decision-making, your audience will probably feel like they've been treated unfairly and might even escalate further with legal action or "yelptribution"—avenging the wrong in social media. While an explanation is ethically necessary, never admit or imply responsibility without written authorization from your company cleared by legal counsel if there's any way that the justification might be seen as actionable (i.e., the offended party can sue for damages).

Use additional strategies to make the justification more agreeable such as focusing on benefits. If you're informing employees that they will have to pay double for parking passes next year in an attempt to reduce the number of cars filling up the parking lot, you could sell them on the health benefits of cycling to work or the environmental benefit of fewer cars polluting the atmosphere. If you're informing a customer asking why a product or service can't include additional features, you could say that adding those features would drive the cost up and you would rather respect your customer's pocketbooks by keeping the product or service more affordable. In any case, try to pitch an agreeable, pro-social or progressive benefit rather than saying that you're merely trying to maximize company or shareholder profits.

8.3.2.3: The Bad News Itself and Redirection

Burying the bad news itself in the message is a defining characteristic of the indirect approach. It's akin to the "poop sandwich" organization of constructive criticism sandwiched between statements of praise (see §11.1.4.2 below). Far from intending to hide the bad news, the indirect approach frames the bad news so that it can be properly understood and its negative (depressing or anger-arousing) impact minimized.

The goal is also to be clear in expressing the bad news so that it isn't misunderstood while also being sensitive to your reader's feelings. If you're rejecting a job applicant, for instance, you can be clear that they didn't get the job without bluntly saying "You failed to meet our criteria" or "You won't be working for us anytime soon." Instead, you can clearly imply it by putting the bad news in a subordinate clause in the passive voice:

Though another candidate was hired for the position, . . .

The passive voice (see §4.3.4 above) enables you to draw attention away from your own role in rejecting the applicant, as well as away from the rejected applicant in the context of the competition itself. Instead, you focus on the positive of someone getting hired. While the rejected applicant probably won't be throwing

a celebration party for the winning candidate, the subordinate clause here allows for speedy redirection to a consolation prize.

Redirection is key to this type of bad news' effectiveness because it quickly shifts the reader's attention to an alternative to what they were seeking in the first place. Some kind of consolation prize (e.g., a coupon or store credit) helps soothe the pain and will be appreciated as being better than nothing, at least. Even if you're not able to offer the reader anything of value, you could at least say something nice. In that case, completing the sentence in the previous paragraph with an active-voice main clause could go as follows:

... we wish you success in your continued search for employment.

This way, you avoid saying anything negative while still clearly rejecting the applicant.

8.3.2.4: Positive Action Closing

As we've seen in previous explorations of message organization (e.g., §6.1.7 on email), the closing here involves action information. If your redirection involves some alternative, such as a recommendation to apply elsewhere, some follow-up details here would help the reader focus on the future elsewhere rather than getting hung up on you and your company's decision. Your goals here are the following

- Ensure that the reader understands the bad news without rehashing it
- Remain courteous, positive, and forward-looking
- End the conversation in such a way that you don't invite further correspondence

The first and last goals are important because you don't want the reader to respond asking you to clarify anything. The second goal is important because you ultimately want to appear respectable and avoid giving the reader a reason to smear your reputation in social media or proceed with legal action against you.

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8.3.3: Avoiding Disaster in Bad-news Messages

Delivering bad news can be dangerous if it angers the reader so much that they are motivated to fight back. If you're not careful with what you say, that message can be used as evidence in a court case that, when read by a judge or jury, could compromise your position. You can lower the risk of being litigated against by following the general principles given below when delivering bad news.

8.3.3.1: Avoid Negative or Abusive Language

Sarcasm, profanity, harsh accusations, and abusive or insulting language may feel good to write in a fit of anger

but, in the end, make everyone's lives more difficult. When someone sends an inflammatory message and it's interpreted by the reader as harmful to their reputation, it could legally qualify as libel that is legitimately actionable. Even if you write critically about a rival company's product or service by stating (as if factually) that it's dangerous, whereas your version of the product or service is safer and better, this can be considered defamation or libel. If said aloud and recorded, perhaps on a smart phone's voice recorder, it is slander and can likewise be litigated. It's much better to always write courteously and maturely, even under difficult circumstances, to avoid fallout that involves expensive court proceedings.

8.3.3.2: Avoid Oversharing but Tell the Truth

When your job is to provide a convincing rationale that might make the recipient of bad news accept it as reasonable, be careful with what details you disclose. When rejecting a job applicant, for instance, you must be especially careful not to lay all your cards on the table by sharing the scoring sheets of the winning and rejected candidates, nor even summarize them. Though that would give them full picture, it would open you up to a flood of complaints and legal or human-rights challenges picking apart every little note. Instead, you would simply wish the rejected candidate luck in their ongoing job search. When you must provide detail, avoid saying anything bad about anyone so that you can't be accused of libel and taken to court for it. Provide only as much information as is necessary to provide a convincing rationale.

At the same, it's important that you tell the truth so that you can't be challenged on the details. If you are inconsistent or contradictory in your explanation, it may invite scrutiny and accusations of lying. Even making false claims by exaggerating may give the reader the wrong impression, which can lead to serious consequences if acted upon. Though some might say that omitting the truth is a form of lying, telling the truth selectively is the necessary compromise of a professional constrained by competing obligations to both the organization they represent and the reader who they don't want to anger or severely disappoint.

8.3.3.3: Respect the Recipient's Privacy

Criticizing an employee in a group email or memo—even if the criticism is fair—is mean, unprofessional, and an excellent way of opening yourself to a world of trouble. People who call out others in front of a group create a chilly climate in the workplace, one that leads to fear, loathing, and a loss of productivity among employees, not to mention legal challenges for possible libel. Called-out employees may even resort to sabotaging the office with misbehaviour such as vandalism, cyberattacks, or theft to get even. Always maintain respect and privacy when communicating bad news as a matter of proper professionalism (Business Communication for Success, 2015, 17.1).

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8.3.4: Crisis Communications

A rumour that the CEO is ill pulls down the stock price. A plant explosion kills several workers and requires evacuating residents in several surrounding city blocks. Risk management seeks to address such risks, including prevention as well as liability, but emergency and crisis situations happen anyway. Employees also make errors in judgment that can damage the public perception of a company. The mainstream media does not lack stories involving infidelity, addiction, or abuse that require a clear response from a company's standpoint. In this chapter we address the basics of a crisis communication plan, focusing on key types of information during an emergency:

- What is happening?
- Is anyone in danger?
- How big is the problem?
- Who reported the problem?
- Where is the problem?
- Has a response started?
- What resources are on-scene?
- Who is responding so far?
- Is everyone's location known? (Mallet, Vaught, & Brinch, 1999)

You will be receiving information from the moment you know a crisis has occurred, but without a framework or communication plan to guide you, valuable information may be ignored or lost. These questions help you quickly focus on the basics of “who, what, and where” in the crisis situation.

A crisis communication plan is the prepared scenario document that organizes information into responsibilities and lines of communication prior to an event. If an emergency arises when you already have a plan in place, each person knows his or her role and responsibilities from a common reference document. Overall effectiveness can be enhanced with a clear understanding of roles and responsibilities for an effective and swift response. The plan should include four elements:

- Crisis communication team members with contact information
- Designated spokesperson
- Meeting place/location
- Media plan with procedures

A crisis communication team includes people who can decide what actions to take, carry out those actions, and offer expertise or education in the relevant areas.

By designating a spokesperson prior to an actual emergency, your team addresses the inevitable need for

information in a proactive manner. People will want to know what happened and where to get further details about the crisis. Lack of information breeds rumours that can make a bad situation worse. The designated spokesperson should be knowledgeable about the organization and its values; be comfortable in front of a microphone, camera, and media lights; and be able to stay calm under pressure.

Part of your communication crisis plan should focus on where you will meet to coordinate communication and activities. In case of a fire in your house, you might meet in the front yard. In an organization, a designated contingency building or office some distance away from your usual place of business might serve as a central place for communication in an emergency that requires evacuating your building. Depending on the size of your organization and its facilities, the emergency plan may include exit routes, hazardous materials procedures (WHMIS), and policies for handling bomb threats, for example. Safety is of course the priority, but in terms of communication, the goal is to eliminate confusion about where people are, where they need to be, and where information is coming from.

Whether or not evacuation is necessary when a crisis occurs, your designated spokesperson will gather information and carry out your media plan. They will need to make quick judgments about which information to share, how to phrase it, and whether certain individuals need to be notified of facts before they become public. The media and public will want to get reliable information, which is preferable to mere spin or speculation. Official responses help clarify the situation for the public, but an unofficial interview can make the tragedy personal and attract unwanted attention. Remind employees to direct all inquiries to the official spokesperson and to never speak anonymously or “off the record.”

Enable your spokesperson to have access to the place you indicated as your crisis contingency location to coordinate communication and activities, and allow them to prepare and respond to inquiries. When crisis communication is handled in a professional manner, it seeks not to withhold information or mislead, but to minimize the “spin damage” from the incident by providing necessary facts even if they are unpleasant or even tragic (Business Communication for Success, 2015, 17.3).

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8.3.5: Direct-approach Bad-news Messages

We’ve so far looked at expressing bad news using the indirect approach, but is it ever right to deliver bad news using the direct approach? Are there occasions where you can or should be upfront about the bad news? In the following situations, yes, it’s certainly appropriate to deliver bad news by getting right to the point:

- **When the bad news isn’t *that* bad:**
 - In the case of small price or rate increases, customers won’t be devastated by having to pay more. Indeed, inflation makes such increases an expected fact of life.
 - If your job involves routinely delivering criticism because you’re a Quality Assurance specialist, the

people who are used to receiving recommendations to improve their work will appreciate the direct approach. Some organizations even require direct-approach communications for bad news as a policy because it is more time-efficient.

- **When you know that the recipient prefers or requires the direct approach:** Though the indirect approach is intended as a nice way to deliver bad news, some people would rather you be blunt. “Give it to me straight, doc. I’m a grown-up. I can take it,” they might say. Since a message must always be tailored to the audience, getting permission for taking the direct approach is your cue to follow through with exactly that. Not doing so will arouse the angry response you would have expected otherwise.
- **When you’re short on time or space:** One of the hallmarks of the indirect approach is that it takes more words than a direct-approach message (see Table 6.1.5 for comparative examples). If time is limited or you’re constrained in how much space you have to write, taking the direct approach is justifiable.
- **When the indirect approach hasn’t worked:** If this is the third time you’ve had to tell a client to pay their invoice and the first two were nicely-worded indirect messages that the recipient ignored, take the kid-gloves off and issue a stern warning of the consequences of not paying. You may need to threaten legal action or say you’ll refer the account to a collection agency, and you may need to put it in bold so that you’re sure the reader won’t miss it.
- **When the reader may miss the bad news:** You may determine from profiling your audience and their literacy level that they might not understand indirect-approach bad news (see Step 1.2 in the writing process in §2.2 on analyzing the audience). If your reader doesn’t have a strong command of English vocabulary and misses words here and there, they may not pick up on the buried bad news past the mid-point of a challenging message.

In the above situations, structure your message following the same three-part organization we’ve seen elsewhere (e.g., §6.1.5 – §6.1.7 on email parts):

1. **Opening:** State the bad news right up front.
2. **Body:** Briefly explain why the bad news happened.
3. **Closing:** Express confidence in continued business relations with a goodwill statement and provide any action information such as contact instructions should the recipient require further information.

Of course, clarity and brevity in such messages is vital to maintaining friendly relations with your audiences (Guffey et al., 2016, p. 190).

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Key Takeaway



Write carefully when addressing negative situations, such as delivering bad news, usually by burying the bad news after a buffer and rationale, and following it with redirection to minimize the harm that the message might cause.

Exercises



1. Think of a time when you were given bad news by email or letter, such as when you were told that a warranty couldn't be honoured for the type of damage inflicted on your product or your application was rejected. How well did it fulfill or fail to fulfill the seven goals of delivering bad news (see §8.3.1 and §8.3.3)?
2. Sales have decreased for two consecutive quarters at your business. You must inform your sales team that their hours and base pay will be reduced by 20 percent if the company is to break even this quarter. While you may have a few members of your sales team that are underperforming, you can't afford to be short-staffed now, so you must keep the entire team for the time being. Write negative news messages in both the direct and indirect approach informing your sales team of the news following the advice in §8.3.2 and §8.3.5 above.
3. Research a crisis in your area of training or career field. What communication issues were present and how did they affect the response to the crisis? If the situation was handled well, what are the major takeaways? If handled poorly, what do you think you would have done differently following the general guidelines in §8.3.4 above?

References

Guffey, M. E., Loewy, D., Almonte, R. (2016). *Essentials of business communication* (8th Can. Ed.). Toronto: Nelson.

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8.4: PERSUASIVE MESSAGES

Learning Objectives



2. Organize and write persuasive messages.

Persuasion involves moving or motivating your audience by presenting arguments that convince them to adopt your view or do as you want. You've been doing this ever since you learned to speak. From convincing your parents to give you a treat to persuading them to lend you the car keys, you've developed more sophisticated means of persuasion over the years simply because of the rewards that come with their success. Now that you've entered (or will soon enter) the professional world, honing persuasive strategies for the workplace is vital to your livelihood when the reward is a sale, a promotion, or merely a regular paycheck.

Persuasion begins with motivation. If persuasion is a process and your audience's action (e.g., buying a product or service) is the goal, then motivating them to accept an argument or a series of positions leading to the decision that you want them to adopt helps achieve that goal. If your goal is to convince a pet owner to spay or neuter their pet, for instance, you would use a few convincing arguments compelling them to accept that spaying or neutering is the right thing to do.

Persuasive Messages Topics

- 8.4.1: The Rhetorical Triangle
- 8.4.2: Principles of Persuasion
- 8.4.3: Indirect AIDA Pattern of Persuasion

8.4.1: The Rhetorical Triangle

Use the **rhetorical triangle** by combining logic, emotional appeal, and authority (a.k.a. *logos*, *pathos*, and *ethos* in classical Aristotelian rhetoric) to cater your message to your audience. You could appeal to their sense of

reason by explaining the logical consequences of not spaying or neutering their pet: increasing the local cat or dog population, or even producing a litter that you yourself have to deal with, including all the care and expenses related to it. You might appeal to their emotions by saying that the litters resulting from your pet's mating with strays will suffer starvation and disease in their short lives. You could establish your credibility by explaining that you've earned a diploma in the Vet Tech program at Algonquin College and have eight years' experience seeing the positive results that spaying or neutering has on local dog or cat populations, making you a trustworthy authority on the topic. All of these moves help overcome your audience's resistance and convince them to follow your advice (*Business Communication for Success*, 2015, 14.1). These three appeals can also complement other effective techniques in persuading an audience as we shall see throughout this section.

8.4.2: Principles of Persuasion

What's the best way to succeed in persuading people to buy what you're selling? Though there may sometimes be a single magic bullet, a combination of strategies has been found to be most effective. Social psychologist Robert Cialdini offers us six principles of persuasion that are powerful and effective no matter what the cultural context. Use them to help persuade people, but also recognize their use by others when determining how you're being led towards a purchase, perhaps even one you should rightly resist.

- 8.4.2.1: Reciprocity
- 8.4.2.2: Scarcity
- 8.4.2.3: Authority
- 8.4.2.4: Commitment and consistency
- 8.4.2.5: Consensus
- 8.4.2.6: Liking

8.4.2.1: Principle of Reciprocity

I scratch your back; you scratch mine. Reciprocity means that when you give something to somebody, they feel obligated to give something back to you in return, even if only by saying "thank you." If you are in customer service and go out of your way to meet the customer's need, you are appealing to the principle of reciprocity with the knowledge that all but the most selfish among us perceive the need to reciprocate—in this case, by increasing the likelihood of making a purchase from you because you were especially helpful. Reciprocity builds trust and a relationship develops, reinforcing everything from personal to brand loyalty. By taking the lead and giving, you build in a moment a sense of obligation motivating the receiver to follow social norms and customs by giving back.

8.4.2.2: Principle of Scarcity

It's universal to want what you can't have. People are naturally attracted to the rare and exclusive. If they are convinced that they need to act now or it will disappear, they are motivated to act. Scarcity is the perception of dwindling supply of a limited and valuable product. For a sales representative, scarcity may be a key selling point—the particular car, theater tickets, or pair of shoes you are considering may be sold to someone else if you delay making a decision. By reminding customers not only of what they stand to gain but also of what they stand to lose, the sales rep increases their chances of swaying the customer from contemplation to action, which is to close the sale.

8.4.2.3: Principle of Authority

Notice how saying “According to researchers, . . .” makes whatever you say after these three words sound more true than if you began with “I think that . . .” This is because you're drawing on authority to build trust (recall the concept of *ethos* from the “rhetorical triangle” in §8.4.1 above), which is central to any purchase decision. Who does a customer turn to? A salesperson may be part of the process, but an endorsement by an authority holds credibility that no one with a vested interest can ever attain. Knowledge of a product, field, trends in the field, and even research can make a salesperson more effective by the appeal to the principle of authority. It may seem like extra work to educate your customers, but you need to reveal your expertise to gain credibility. We can borrow a measure of credibility by relating what experts have indicated about a product, service, market, or trend, and our awareness of competing viewpoints allows us insight that is valuable to the customer. Reading the manual of a product is not sufficient to gain expertise—you have to do extra homework. The principle of authority involves referencing experts and expertise.

8.4.2.4: Principle of Commitment and Consistency

When you commit to something, you feel obligated to follow through on it. For instance, if you announce on social media that you're going to do yoga every day for a month, you feel greater pressure to actually do so than if you resolved to do it without telling anyone. This is because written words hold a special power over us when it feels as though their mere existence makes what we're doing “official.” If we were on the fence, seeing it now in writing motivates us to act on it and thereby honour our word by going through with the purchase. In sales, this could involve getting a customer to sign up for a store credit card or a rewards program.

8.4.2.5: Principle of Consensus

If you make purchase decisions based on what you see in online reviews, you're proving how effective the

principle of consensus can be. People trust first-person testimonials when making purchase decisions, especially if there are many of them and they're unanimous in their endorsement. The herd mentality is a powerful force across humanity. If “everybody else” thinks this product is great, then it must be great. Such *argumentum ad populum* (Latin for “argument to the people”) is a logical fallacy because there's no guarantee that something is true if the majority believe it. We are genetically programmed to trust our tribe in the absence more credible information, however, because it makes decision-making easier in the fight for survival.

8.4.2.6: Principle of Liking

We are more likely to buy something from someone we like, who likes us, who is attractive, and who we can identify with because we see enough points of similarity between ourselves. These perceptions offer a sense of safe belonging. If a salesperson says they're going to cut you a deal because they like you, your response is to reciprocate that acceptance by going through with the deal. If you find them easy to look at—no matter which sex—you are predisposed to like them because, from an evolutionary standpoint, attractiveness suggests genetic superiority and hence authority. Furthermore, if the salesperson makes themselves relatable by saying that they had the same problem as you and this is what they did about it, you're more likely to follow their advice because that bond produces the following argument in your mind: “This person and I are similar in that we share a common problem, they solved it expertly by doing X, and I can therefore solve the same problem in my life by doing X” (*Business Communication for Success*, 2015, 14.2).

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8.4.3: Indirect AIDA Pattern of Persuasion

When you consider the tens or hundreds of thousands of TV commercials you've seen in your life, you understand how they all take the indirect approach (typically associated with delivering bad news, as we saw in §4.1.2 and §8.3 above) because they assume you will resist parting with your money. Instead of taking a direct approach by simply saying in seven seconds “Come to our store, give us \$100, and we'll give you these awesome sunglasses,” commercials use a variety of techniques to motivate you to ease your grip on your money. They will dramatize a problem-solution scenario, use celebrity endorsements, humour, special effects, jingles, intrigue, and so on. You're well familiar with the pattern from having seen and absorbed it many times each day of your life, but when you must make a persuasive pitch yourself as part of your professional duties, you may need a little guidance with the typical four-part indirect pattern known as “AIDA”:

- 8.4.3.1: **A** – Attention-getting Opening
- 8.4.3.2: **I** – Interest-building Body
- 8.4.3.3: **D** – Desire-building Details and Overcoming Resistance

- 8.4.3.4: **A** – Action-motivating Closing

8.4.3.1: A – Attention-getting Opening

When your product, service, or initiative is unknown to the reader, come out swinging to get their attention with a surprise opening. Your goal is to make it inviting enough for the reader to want to stay and read the whole message. The opening can only do that if it uses an original approach that connects the reader to the product, service, or initiative with its central selling feature. This feature is what distinguishes it from others of its kind; it could be a new model of (or feature on) a familiar product, a reduced price, a new technology altogether, etc. A tired, old opening sales pitch that appears to be aimed at a totally different demographic with a product that doesn't seem to be any different from others of its kind, however, will lose the reader at the opening pitch. One that uses one of the following techniques, however, stands a good chance of hooking the reader in to stick around and see if the pitch offers an attractive solution to one of their problems:

- Focus on the **solution's benefits**:
 - *Imagine cooling down from your half-hour sunbath on the white-sand beach with a dip in turquoise Caribbean waters. This will be you if you book a Caribbean Sun resort vacation package today!*
 - *What if I told you that you could increase your sales by 25% in the next quarter by using an integrated approach to social media?*
 - *Consider a typical day in the life of a FitBit user: . . .*
- Focus on the **problem scenario**:
 - *Is your hard-earned money just sitting in a chequing account losing value from inflation year after year?*
 - *Have you ever thought about investing your money but have no idea where to start?*
- **Surprising quotation**, fact, or statistic:
 - *Yogi Berra once said, "If you come to a fork in the road, take it!" At Epic Adventures, any one of our Rocky Mountain hiking experiences will elevate you to the highest of your personal highs.*
 - *The shark is the ocean's top predator. When you're looking to invest your hard-earned money, why would you want to swim with sharks? Go to a trusted broker at Lighthouse Financial.*
 - *Look around the room. One in five of you will die of heart disease. Every five minutes, a Canadian aged 20 or over dies from heart disease, the second leading cause of death in the country. At the Fitness Stop, keep your heart strong with your choice of 20 different cardio machines and a variety of aerobics programs designed to work with your busy schedule.*

The goal here is to get the reader thinking, "Oooh, I want *that*" or "I *need* that" without giving them an opportunity to doubt whether they really do. Of course, the attention-gaining opening is unnecessary if the

reader already knows something about the product or service. If the customer comes to you asking for further details, you would just skip to the I-, D-, or A-part of the pitch that answers their questions.

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8.4.3.2: I – Interest-building Body

Once you’ve got the reader’s attention in the opening, your job is now to build on that by extending the interest-building pitch further. If your opening was too busy painting a solution-oriented picture of the product to mention the company name or stress a central selling feature, now is the time to reveal both in a cohesive way. If the opening goes “What weighs nothing but is the most valuable commodity in your lives? —Time,” a cohesive bridge to the interest-building bod of the message could be “At Synaptic Communications, we will save you time by . . .” Though you might want to save detailed product description for the next part, some description might be necessary here as you focus on how the product or service will solve the customer’s problem.

Key to making this part effective is describing how the customer will use or benefit from the product or service, placing them in the centre of the action with the “you” view (see §4.5.2.5.1 above):

When you log into your WebCrew account for the first time, an interactive AI guide will greet and guide you through the design options for your website step by step. You will be amazed by how easy it is to build your website from the ground up merely by answering simple multiple-choice questions about what you want and selecting from design options tailored to meet your individual needs. Your AI guide will automatically shortlist stock photo options and prepare text you can plug into your site without having to worry about permissions.

Here, the words you or your appear 11 times in 3 sentences while still sounding natural rather than like a high-pressure sales tactic.

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8.4.3.3: D – Desire-building Details and Overcoming Resistance

Now that you’ve hooked the reader in and hyped-up your product, service, or idea with a central selling feature, you can flesh out the product description with additional **evidence** supporting your previous claims. Science and the rational appeal of hard facts work well here, but the evidence must be appropriate. A pitch for a sensible car, for instance, will focus on fuel efficiency with litres per 100km or range in number of kilometres per battery charge in the case of an electric vehicle, not top speed or the time it takes to get from 0 to 100 km/h. Space permitting, you might want to focus on only two or three additional selling features since this is still a

pitch rather than a product specifications (“specs”) sheet, though you can also use this space to point the reader to such details in an accompanying document or webpage.

Testimonials and guarantees are effective desire-building contributions as long as they’re believable. If someone else much like you endorses a product in an online review, you’ll be more likely to feel that you too will benefit from it (see §8.4.1.5 above on the principle of consensus). A **guarantee** will also make the reader feel as though they have nothing to lose if they can just return the product or cancel a service and get their money back if they don’t like it after all. Costco has been remarkably successful as a wholesaler appealing to individual grocery shoppers partly on the strength of a really generous return policy.

Rhetorically, this point in the pitch also provides an opportunity to raise and defeat objections you anticipate the reader having towards your product, service, or idea. This follows a technique called **refutation**, which comes just before the conclusion (“peroration”) in the six-part classical argument structure. It works to dispel any lingering doubt in the reader’s mind about the product as pitched to that point.

If the product is a herbicide being recommended as part of a lawncare strategy, for instance, the customer may have reservations about spreading harmful chemicals around their yard. A refutation that assures them that the product isn’t harmful to humans will help here, especially if it’s from a trusted source such as Canada Health or *Consumer Reports*. Other effective tricks in the vein of emotional appeal (complementing the evidence-based rational appeal that preceded it) include picturing a worst-case scenario resulting from not using the product. Against concerns about using a herbicide, a pitch could use scare-tactics such as talking about the spread of wild parsnip that can cause severe burns upon contact with skin and blindness if the sap gets in your eyes. By steering the customer to picturing their hapless kids running naïvely through the weeds in their backyard, crying in pain, rubbing their eyes, and going blind, you can undermine any lingering reservations a parent may have about using the herbicide.

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8.4.3.4: A – Action-motivating Closing

The main point of your message directs the reader to act (e.g., buy your product or service), so its appearance at the end of the message—rather than at the beginning—is what makes an AIDA pitch indirect. If the AID-part of your pitch has the reader feeling that they have no choice but to buy the product or service, then this is the right time to tell them how and where to get it, as well as the price.

Pricing itself requires some strategy. The following are well-known techniques for increasing sales:

- **Charm pricing:** dropping a round number by a cent to make it end in a 99 because the casually browsing consumer brain’s left-digit bias will register a price of \$29.99 as closer to \$20 than \$30, especially if the 99 is physically smaller in superscript (\$29⁹⁹).
- **Prestige pricing:** keeping a round number round and dropping the dollar sign for a luxury item. For instance, placing the number 70 beside a dinner option on a fancy restaurant’s menu makes it look like a

higher-quality dish than if it were priced at \$6999. To impress a date with your spending power, you'll go for the 70 option over something with charm pricing.

- **Anchoring:** making a price look more attractive by leading with a higher reference price. For instance, if you want to sell a well-priced item, you would strategically place a more expensive model next to it so that the consumer has a sense of the price range they're dealing with when they don't otherwise know. They'll feel like they're getting more of a bargain with the well-priced model. Similarly, showing the regular price crossed out near the marked-down price on the price tag is really successful in increasing sales (Boachie, 2016).

If the product or service is subscription-based or relatively expensive, breaking it down to a monthly, weekly, or even daily price installment works to make it seem more manageable than giving the entire sum. Equating it to another small daily purchase also works. The cost of sponsoring a child in a drought-stricken nation sounds better when it's equated with the cost of a cup of coffee per day. A car that's a hundred dollars per week in lease payments sounds more doable than the entire cost, especially if you don't have \$45,000 to drop right now but are convinced that you must have that car anyway. Framing the price in terms of how much the customer will save is also effective, as is brushing over it in a subordinate clause to repeat the central selling point:

For only \$49.99 per month, you can go about your business all day and sleep easy at night knowing your home is safe with Consumer Reports' top-rated home security system.

Action directions must be easy to follow to clinch customer buy-in. Customers are in familiar territory if they merely have to go to a retail location, pick the unit up off the shelf, and run it through the checkout. Online ordering and delivery is even easier. Vague directions ("See you soon!") or a convoluted, multi-step registration and ordering process, however, will frustrate and scare the customer away. Rewards for quick action are effective (see §8.4.3.2 above on the principle of scarcity), such as saying that the deal holds only while supplies last or the promo code will expire at the end of the day.

Sales pitches are effective only if they're credible (see §8.4.2.3 above on the principle of authority). Even one exaggerated claim can sink the entire message with the sense that it's all just snake-oil smoke and mirrors. Saying that your product is the best in the world, but not backing this up with any third-party endorsement or sales figures proving the claim, will undermine every other credible point you make by making your reader doubt it all (Lehman, DuFrene, & Murphy, 2013, pp. 134-143). We'll return to topic of avoidable unethical persuasive techniques in §10.2.4 below, but first let's turn our attention in the next section to a more uplifting type of message.

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Key Takeaway



Use reliable strategies and persuasive indirect message patterns to persuade readers to buy products or services, adopt your ideas, or support initiatives.

Exercises



1. Recall a purchase where you were upsold or bought something that you later regretted after following the salesperson's advice. Break down how they were able to convince you to want something you didn't need to the point of acting on that desire. Identify which of the principles of persuasion (outlined in §8.4.2 above) they used to get your dollar.
2. Let's say you have a database of customers who have consented to receiving notices of promotional deals and special offers from the company you work for in the profession of your choosing or an industry adjacent to it (e.g., if you're training to be a police officer, put yourself in the position of marketing for a company selling tasers to police departments). Write a one-page letter that will be mailed out to each convincing them to purchase a new product or service your company is offering. Follow the indirect AIDA pattern described in §8.4.3 and involve some of the persuasive strategies summarized in §8.4.2 above.

References

Boachie, P. (2016, July 21). 5 strategies of 'psychological pricing.' *Entrepreneur*. Retrieved from <https://www.entrepreneur.com/article/279464>

Lehman, C. M., DuFrene, D, & Murphy, R. (2013). *BCOM* (1st Can. Ed.). Toronto: Nelson Education.

8.5: GOODWILL MESSAGES AND RECOMMENDATIONS

Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Write routine message types such as goodwill messages.

Share the love! Rather than an optional cherry on top, goodwill messages are as essential to healthy professional relationships as they are in personal ones. Thank-you, congratulatory, and sympathy notes add an important, feel-good human touch in a world that continues to embrace technology that isolates people while being marketed as a means of connecting them. The goodwill that such messages promote makes both sender and receiver feel better about each other and themselves compared with where they'd be if the messages weren't sent at all. In putting smiles on faces, such notes are effective especially because many people don't send them—either because they feel that they're too difficult to write or because it doesn't even occur to them to do so. Since praise for some can be harder to think of and write than criticism, a brief guide on how to do it right may be of help here.

Goodwill Messages and Recommendations Topics

- 8.5.1: The 5 S's of Goodwill Messages
- 8.5.2: Thank-you Notes
- 8.5.3: Congratulatory Messages
- 8.5.4: Expressions of Sympathy
- 8.5.5: Replying to Goodwill Messages
- 8.5.6: Recommendation Messages and Reference Letters

8.5.1: The 5 S's of Goodwill Messages

Whether you're writing thank-you notes, congratulatory messages, or expressions of sympathy, follow the "5 S" principles of effective goodwill messages:

- **Specific:** Crafting the message around specific references to the situation that it addresses will steer such messages away from the impression that they were boilerplate template statements that you plagiarized.
- **Sincere:** A goodwill message will come off as genuine if it's near to what you would say to the recipient in person. Avoid cliché Hallmark-card expressions and excessive formality such as *It is with a heavy heart that I extend my heartfelt condolences to you in these sad times.*
- **Selfless:** Refer only to the person or people involved rather than yourself. The spotlight is on them, not you. Avoid telling stories about how you experienced something similar in an attempt to show how you relate.
- **Short:** Full three-part messages and three-part paragraphs are unnecessary in thank-you notes, congratulatory messages, or expressions of sympathy, but appropriate in recommendations that require detail. Don't make the short length of the message deter you from setting aside time to draft it.
- **Spontaneous:** Move quickly to write your message so that it follows closely on the news that prompted it. A message that's passed its "best before" date will appear stale to the recipient and make you look like you can't manage your time effectively (Guffey et al., 2016, p. 144).

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8.5.2: Thank-you Notes

In the world of business, not all transactions involve money. People do favours for each other, and acknowledging those with thank-you notes is essential for keeping relations positive. Such messages can be short and simple, as well as quick and easy to write, which means not sending them when someone does something nice to you appears ungrateful, rude, and inconsiderate. Someone who did you a favour might not bother to do so again if it goes unthanked. Such notes are ideal for situations such as those listed in Table 8.5.2:

Table 8.5.2: Common Reasons for Expressing Thanks in Professional Situations

Sender	Recipient	Favour
Employer	Employee	The employee went above and beyond the call of duty, perhaps under exceptionally difficult circumstances.
Employee	Employer	The employer gave the employee an opportunity for promotion.
Employee	Coworker	The employee mentored the co-worker so that the latter looked good to customers and management.
Applicant	Employer	The employer is considering hiring the job applicant, who sends a thank-you message within 24 hours after a job interview.
Applicant	Previous employer	The job applicant sends their previous employer a thank-you note for endorsing them as a reference.
Business	Customer	The customer ordered products or services.
Business	Customer	The customer complained about the service, enabling the business to improve and better meet customer expectations.
Business	Another business	One business endorsed another, directing customers their way.
Customer	Employee	The employee (e.g., restaurant server) demonstrated exceptional customer service, perhaps under difficult circumstances.
One person	another	One person's act of kindness, including kind words said or sent, gifts given, or hospitality extended, was appreciated.

In most situations, email or text is an appropriate channel for sending thank-you messages. As we shall see in §10.3.3 below, sending a thank-you note within 24 hours of interviewing for a job is not just extra-thoughtful but close to being an expected formality. To stand out from other candidates, hand-writing a thank-you card in such situations might even be a good idea.

Following the 5 S's of goodwill messages given above in §8.5.1, a typical thank-you email message for a favour might look like the following:

Hi Alanna,

I just wanted to thank you for putting in a good word for me with your manager. She told me today that I came highly recommended, and I knew right away who that came from—only the most kind and thoughtful person I've ever had the pleasure of working with! I really appreciate all the help you've given me over the years, but especially for bringing me this opportunity. It means a lot to me and my family.

If there's anything I can help you with in return—anything at all—you name it. I owe you one.

Many thanks,

Jeremy

Notice that this message is short, specific to the situation that prompted it, sincere, relatively selfless, and

spontaneously sent the day of the incident that prompted it. It would certainly bring a smile both to the recipient and sender, strengthening their professional bond.

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8.5.3: Congratulatory Messages

Celebrating the successes of your professional peers shows class and tact. It's good karma that will come back around as long as you keep putting out positive energy. Again, the 5 S's apply in congratulatory messages, especially selflessness. Such messages are all about the person you're congratulating. You could say, for instance, *I really admire how you handled yourself with such grace and poise under such trying circumstances in the field today.*

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8.5.4: Expressions of Sympathy

Few situations require such sincerity and care with words as expressions of sympathy. Misfortune comes upon us all, and tough times are just a little more tolerable with the support of our friends, family, and community—including those we work with. When the loved-one of a close associate dies, for instance, expressing sympathy for their loss is customary, often with a card signed by everyone in the workplace who knows the bereaved. You can't put an email on the mantle like you can a collection of cards from people showing they care.

What do you say in such situations? A simple *I'm so sorry for your loss*, despite being a stock expression, is better than letting the standard Hallmark card's words speak for you (Guffey et al., 2016, p. 147). In some situations, laughter—or at least a chuckle—may be the best medicine, in which case something along the lines of Emily McDowell's witty Empathy Cards would be more appropriate. McDowell's *There Is No Good Card for This: What to Say and Do When Life Is Scary, Awful, and Unfair to People You Love* (2016) collaboration with empathy expert Kelsey Crowe, PhD, provides excellent advice. Showing empathy by saying that you know how hard it can be is helpful as long as you don't go into any detail about their loss or yours. Remember, these messages should be selfless, and being too specific can be a little dangerous here if it produces traumatic imagery. Offering your condolences in the most respectful, sensitive manner possible is just the right thing to do.

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8.5.5: Replying to Goodwill Messages

It wouldn't go over well if someone thanked you for your help and you just stared at them silently. The normal reaction is to simply say *You're welcome!* Replying to goodwill messages is therefore as essential as writing them. Such replies must be even shorter than the messages that they respond to. If someone says a few nice things about you in an email about something else, always acknowledge the goodwill by saying briefly "Thank you very much for the kind words" somewhere in your response. Without making a mockery of the situation by thanking a thank-you or shrugging off a compliment, returning the love with nicely worded and sincere gratitude is the right thing to do (Guffey et al., 2016, p. 147).

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8.5.6: Recommendation Messages and Reference Letters

Recommendation messages are vital to getting hired, nominated for awards, and membership into organizations. They offer trusted-source testimonials about a candidate's worthiness for whatever they're applying to. Like the résumé and cover letter they corroborate, their job is to persuade an employer or selection committee to accept the person in question. To be convincing, recommendation and reference letters must be the following:

- **Specific:** Recommendation and reference letters must focus entirely on the candidate with details such as examples of accomplishments, including dates or date ranges in months and years. A generic recommendation plagiarized from the internet is worse than useless because it makes the applicant look like they're unworthy of a properly targeted letter.
- **True:** Exaggerations and outright lies will hurt the candidate when found out (e.g., in response to job interview questions and background checks). They will spoil the chances of any future applicants who use recommendations from the same untrustworthy source if the employer sees that source cross their desk again.
- **Objective:** An endorsement from a friend or family member will be seen as subjective to the point of lacking any credibility. Recommendations must therefore come from a business owner, employer, manager, or supervisor who can offer an unbiased assessment.

Not all employers require recommendation letters of their job candidates, so only bother seeking a recommendation letter when it's asked for. Opinions are divided on whether such documents are actually useful, since they are almost always "glowing" because they tend not to say anything negative about the applicant despite the expectation that they be objective. Some employers—especially in larger

organizations—are instructed not to write recommendation letters (or are limited in what they can say if called for a reference) because they leave the company that writes them open to lawsuits from both the applicant and recipient company if things don’t work out.

On the other hand, recommendation letters provide potential employers with valuable validation of the job applicant’s claims, so it’s worth knowing how to ask for one and what to ask for if they’re required as part of a hiring process. Even if it may be some years before you’re in a position to write such letters yourself, knowing what information to provide the person who agrees to write you a recommendation is useful to you now. Indeed, since most managers are busy people, they might even ask you to draft it for them so they can plug it into a company letterhead template, sign it, and send it along. If so, then you could ghost-write it using the following section as your guide.

8.5.6.1: Recommendation Letter Organization

A recommendation letter is a direct-approach message framed by a modified-block formal letter using company letterhead (see §7.1 above). The most effective letters are targeted to an employer for a specific job application, though it’s not uncommon to request a “To Prospective Employers” recommendation letter without a recipient address to be distributed as part of any job application. In any case, the following represents the standard expectations employers have for recommendation letter content and organization:

1. **Opening:**

- Identify the applicant by **name**, the **position** sought, and the **confidential** nature of the letter—e.g., *This confidential letter is written at the request of Elizabeth Barrie in support of her application for the position of Legal Assistant at Bailey & Garrick Law.*
- Clarify the writer’s **relationship** to the applicant and the **length** of its duration—e.g., *For three years I have been Ms. Barrie’s supervisor at Stanton & Sons Legal Counsel and can therefore say with confidence that she would be a valuable addition to your firm.*

2. **Body:**

- Identify the job applicant’s previous duties—e.g., *Ms. Barrie began working for us as a part-time legal research assistant during her studies in the Law Clerk program at Algonquin College. She began with mainly clerical duties such as preparing official legal documents and archiving our firm’s records.*
- Give examples of the applicant’s accomplishments and professional attributes. Wherever achievements are quantifiable, include numbers—e.g., *After initiating and executing a records digitization project involving over 12,000 files, Ms. Barrie conducted more extensive legal research*

activities. Her superior organizational skills and close attention to detail made her a highly dependable assistant that our six associate lawyers and two partners relied on heavily to conduct research tasks. Her conscientiousness meant that she required very little direction and oversight when performing her duties.

- Compare the applicant to others—e.g., *Without a doubt, Ms. Barrie has been our most productive and trusted legal assistant in the past decade.*

3. Closing:

- Summarize and emphatically state the **endorsement**—e.g., *Any law firm would be lucky to have such a consummate professional as Ms. Barrie in their employ. I highly recommend her without reservation. If you would like to discuss this endorsement further, please contact me at the number above.*

Because honesty is of paramount importance in a recommendation letter, including specific evidence of performance flaws wouldn't be out of place, especially if used in a narrative of promotion and improvement. Including criticism of the candidate helps the credibility of the endorsement because it makes it more believable. After all, no one is perfect. Criticism resolved by a narrative of improvement, however, strengthens the endorsement even further. Consider, for instance, how good this looks:

Ms. Barrie tended to sacrifice quantity of completed research tasks to quality, completing perhaps 17 out of an expected 25 assignments per day. However, she increased her speed and efficiency such that, in her last year with us, she was completing more tasks with higher accuracy than any other assistant we've ever had.

Of course, this general frame for recommendations can be adapted and either extended or trimmed for channels other than letters. LinkedIn, for instance, allows users to endorse each other, but the small window in which the endorsement appears favours a smaller wordcount than the typical letter format. In that case, one paragraph of highlights and a few details is more appropriate than several paragraphs, especially if you can get several such endorsements from a variety of network contacts.

8.5.6.2: How to Request a Recommendation Letter

When a recommendation is necessary, be sure to ask a manager or supervisor who's known you for two years or more if they can provide you with a *strong* reference. If they can't—because they're prohibited from doing so by company policy or they honestly don't think you're worthy of an endorsement—they'll probably just recommend that you find and ask someone who would. Don't be shy about asking for one, though. If they aren't directed otherwise, management understands that writing such messages is part of their job. They got to where they are on the strength of references and recommendations from their previous employers, and the

“pay-it-forward” system compels them to provide the same for the people under—people like you. That way, you too can move up in your career.

Knowing that every employment situation you’re in provides an opportunity for a reference when it’s time to move on, you should always do your best so that you can get a strong reference out of it. Even in jobs that you dislike or that bore you, strive to exemplify the advice on employer-impressing professional behaviour given throughout §10.2 below. Consider also that if a résumé lists references at the end but omits them for certain job experiences, a hiring manager will wonder why you weren’t able to get a reference for that job. It certainly could have been due to company policy prohibiting managers from providing references for legal reasons or conflict with management that was entirely their fault (not all managers are decent human beings as we shall discuss in §11.1.3.3 below); without the full picture, however, the omission opens the door to doubts about the candidate.

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Key Takeaway



Despite being treated by some as optional, goodwill messages are essential to healthy professional relationships and professional advancement as long as you follow the writing conventions associated with them.

Exercises



1. Partner up with a classmate you admire. If you don’t have a LinkedIn profile already, start one by following the general advice in §9.2.1.1 and specific advice provided in the websites linked there. Write an endorsement for your partner in LinkedIn following the general principles in §8.5.6 above.
2. Write a thank-you note to the partner who wrote you an endorsement in LinkedIn following the advice in §8.5.2 and §8.5.5 above.

References

Guffey, M.E., Loewy, D., & Almonte, R. (2016). *Essentials of business communication* (8th Can. ed.). Toronto: Nelson.

PART IV

UNIT 4: EMPLOYMENT AND INTERPERSONAL COMMUNICATION



Common COMM Course Learning

Outcomes

This unit supports the following course learning outcomes (*COMM 3048, COMM 3073, COMM 3074, COMM 3075, COMM 3077, COMM 3080, COMM 3082*):

- **1. Compose** workplace documents including emails, letters, and a research report.
- **2. Analyze** an audience and tailor a message to that audience (objective/subjective writing, persuasive writing, internal/external audience).
- **3. Apply** principles of grammar, punctuation, and editing appropriate to professional writing.
- **4. Prepare** documents according to basic principles of formatting and visual communication in various written documents.

COMM 3020:

- **1. Communicate** clearly, concisely and correctly in the written, spoken and visual form that fulfills the purpose and meets the needs of the audience.
- **3. Create** well-organized business documents (including emails, letters and reports).
- **4. Compose** stylistically appropriate business documents.
- **8. Create** a resume and cover letter for use in employment searches.
- **9. Explain** cultural differences and the impact these differences have on effective business communication.

CHAPTER 9: JOB SEARCH, RÉSUMÉS AND COVERS LETTERS

Jordan Smith

Chapter Learning Objectives

1. Represent skills, knowledge, and experience realistically for employment purposes.
2. Identify and assess individual skills, strengths, and experiences to identify career and professional development goals.
3. Research the job market to identify career opportunities and requirements.
4. Prepare a targeted and persuasive cover letter and resume.

If you devote a portion of your life to training for a career, nothing is more important at the end of that program than getting a job where you can apply your training. The job application process poses a challenge that requires a skill set quite different from that which your core program courses teach you, yet you cannot get a job without it. In most professions, the competition for jobs is so fierce that only your communication A-game can help you through the communication test that is the hiring process.

A hiring competition involves a written and oral exam. You must pass the written component (the cover letter and résumé) before you move on to the oral (the interview), and you must out-perform the competition in the oral to get the job. The oral component proves that you can carry a conversation, represent the company in face-to-face interactions with customers, and see eye-to-eye with managers and co-workers while conducting day-to-day operations in a personable manner. Representing you in your physical absence, your cover letter and résumé mainly assure employers that you have the experience and skills required to be successful in the job. They also prove whether you are literate and conscientious enough to represent the company respectability when writing on their behalf to customers and other stakeholders.

This chapter focuses on the written component of the hiring process, saving the oral for §10.3 below. We begin with the research component that informs how you will write those pieces. At this point it's worth saying that the advice given here represents a fairly broad consensus of employer expectations, but it can't apply to all because each employer is unique in what they're seeking from applicants. It's like dating: everyone has a

unique laundry list of preferences formed by genes and experience narrowing down who they're attracted to. If someone falls within the range of what you're looking for and you fall within their range, then it might work out. The only way to know for sure that you're both what the other is looking for is by flirting, which means, in the world of job hunting, networking. After examining strategies for job hunting, we'll cover the résumé and cover letter-writing process with the goal of producing job application materials that will considerably increase your chances of getting an interview.

- 9.1: The Job Search
- 9.2: Résumés and Online Applications
- 9.3: Cover Letters

9.1: THE JOB SEARCH

Learning Objectives



1. Represent skills, knowledge, and experience realistically for employment purposes.
2. Identify and assess individual skills, strengths, and experiences to identify career and professional development goals.

Today both job seekers and recruiters have more ways than ever to connect with one another. Though the traditional means of in-person networking are still necessary, online networking has also become the norm. As in the world of dating, technology can certainly help connect people according to compatible interests and preferences; from there, however, the relationship depends entirely on how things go in person. This chapter section examines the spectrum of job search tools and techniques available to the modern job seeker. It provides guidance on how you can prepare a résumé and cover letter that will increase your chances of getting an interview and hence a job.

Job Search Topics

- 9.1.1: Assess Your Skills and Qualifications
- 9.1.2: Find Job Postings
- 9.1.3: Traditional Job Search Techniques

9.1.1: Assess Your Skills and Qualifications

The first step to putting together a winning résumé is to list your employable skills and qualifications. Which of your qualities make you hireable? If these don't come immediately to mind or the wording eludes you, a good place to start is the vocational learning outcomes of your current academic program. These describe the skills that industry employers have said graduates must have to be considered for hire. Find these on the program webpage for your academic institution. Though they are quite general, you can find more specific learning

outcomes on the syllabus for each course in the program. Every Algonquin College course outline, for instance, lists Course Learning Requirements (CLRs) and a more detailed list of Embedded Knowledge and Skills under each CLR. If you did well in these courses, these general and specific learning outcomes describe what you are now able to do.

Of course, you can't possibly put all of these on a résumé because the full list would include too many, be too detailed, and would be worded in a manner unsuitable for a résumé. At this point, however, what's important is that you begin a master list of such skills that you can tailor for the résumé when you see what skills and duties employers list in their job postings. Matching the skills you have with those employers want is the key to a successful application.

In addition to program-specific skills, you can also add a range of other skills. Get started by asking yourself the following questions:

- What specific computer programs am I good at? Do I have examples of work I can show an employer of how I've used them at an intermediate or advanced level?
- Do I work well with others? Have I demonstrated this with my employment experience or with volunteer or extracurricular activities such as league sports or clubs?
- Am I better at following instructions or giving them? Am I destined for leadership roles? What proof can I offer up either way?
- Can I read, write, and converse in another language besides English? At what level of proficiency?
- Am I a quick learner? Am I a creative thinker? Can I think of specific instances as proof of my answers to these questions if asked in a job interview?
- Am I a good communicator in both written and spoken situations? What evidence can I offer employers of my proficiency in both? (Guffey, Loewy, & Almonte, 2016, pp. 377-378)

Not only will a few pages of notes in answer to these questions help you prepare résumés and cover letters, but they will also help you prepare for the job interview later.

Return to the Job Search Topics menu

9.1.2: Find Job Postings

Though the major job search engines like Monster and Indeed are good places to start, they should be only a part of a broader job-search strategy. Both job seekers and employers have their objections to these sites. To seekers, applying through them can be frustrating for the following reasons:

- Some will strip out the formatting you've meticulously assembled for your résumé and cover letter
- Submitting confidential information about yourself to them feels risky
- They can feel like vast abysses into which you send dozens of applications you've laboured over for

hours, but without ever receiving a response back

To employers and recruiters, the big job sites attract a flood of poor-quality applicants from around the world, leaving the hiring manager or committee with the time-intensive job of sorting out the wheat from the chaff—i.e., the applicants worth seriously considering from the droves of under-qualified applicants taking shots in the dark with what amounts to spam applications. With such a demanding selection process, employers simply don't have time to respond to them all.

Nonetheless, ignoring these sites altogether would be a mistake because too many employers use them to advertise positions. When your full-time job is just to find a full-time job, you can't leave any stone unturned. The following are sites worth searching for job postings and other information they offer on the job market:

- Job Bank
- Monster
- Indeed
- Workopolis
- CareerBuilder
- Eluta
- Jobboom
- Glassdoor
- SimplyHired
- WOWjobs
- Charity Village for non-profit and volunteer positions

A search for the jobs available in the career you're training for may yield depressingly few hits if you use just one or two of the above sites. If so, be prepared to use all of them and widen your search area to neighbouring towns, large urban centres, and even other provinces and countries. Even if you aren't seriously considering moving for a job—if your strategy is just to wait until relevant jobs arise closer to home—at least getting a sense of what's out there elsewhere is an important exercise for now. Beyond the above sites, also seek out the following:

- Job search engines specific to your sector or field
- Professional association sites specific to your field
- Company/organization websites (look for their Careers page)
- Professional networking sites such as LinkedIn and Facebook

Your goal is to collect as many job leads as possible to get a full sense of what's available before focusing on those worth devoting significant time to.

Once you've collected some job postings for positions you can pursue seriously, your next step is to compile a set of notes that will furnish all the necessary information for a cover letter and résumé. For each position you find a posting for, list the following:

1. Job title exactly as given in the job posting

- Use this in the subject line for both your cover letter and in the Objective statement in your résumé proper.
- Also copy and paste the reference number if the position has one. Larger organizations that have a dedicated human resources (HR) department will catalogue their hiring competitions, so giving the reference number for the position you're applying for provides the organization with the information they need to process your application properly. That will put you in their good graces.

2. Required skills, competencies, and qualifications

- Every job posting worth applying to lists skills the employer is looking for in the ideal employee for that position. These may also take the form of job duties. Copy and paste these into your notes to ensure accuracy of transcription.
- Use this list as a guide for what to include in the Skills and Qualifications Summary section of your résumé, as well as under entries in the Employment and/or Education sections as proof that you've developed the skills the employer requires of applicants. If the employer or their third-party recruiter agents use an electronic filter to dispose of applications that don't match enough of the key words present in the posting, basing your résumé on the posting's list of skills will increase your chances of success. Copy the exact wording.
- Don't let the fact that you don't have everything the employer asks for be a reason to shoot yourself down for them. Some employers may ask for too much when listing required educational credentials and experience to see if the unicorn they seek actually exists. If not, they'll select from among the next-best applicants. If you have reasonably equivalent experience or potential instead of the exact credential required by the employer, find opportunities in your résumé, cover letter, and interview to explain how you can nonetheless deliver on what they want.

3. Company name, mailing address, and website

- Find the mailing address on the company website's Contact page
- Use the company name in your targeted résumé's Objective statement and both the name and mailing address in your cover letter. This will clarify to the hiring manager that your application is specific to the

location where you intend to work.

- Use the website to research the company (see below).

4. Company background

- Search the company website, especially its *About Us* page, for basic details about its size, history, and mission or vision statement.
- Extend this research to an online search for news about the company beyond what they present themselves. Look especially for recent news items that might offer clues as to why they're hiring and what problems they need to solve. Knowing this informs how you persuasively pitch yourself as part of the solution to those problems.
- Use this information to inform your cover letter and prepare your interview talking points (see 11.6 below). Paraphrasing the employer's mission or vision statement to make it your own in both the cover letter and interview will help convince the employer that your priorities align with theirs and you'll fit the company culture.

5. Services and products

- Sketch out a list of the company's products and/or services; if these number in the dozens, hundreds, or thousands, just give some major categories relevant to the job you'd do for them.
- Use this knowledge to prepare for parts of the cover letter and interview.

6. Clientele

- Identify demographic and other information about the company's customer base or clientele. Since the first rule of business is to know the customer, what they want, and how to provide it, proving your understanding of these will help convince the employer that you share their priorities.
- Use this to prepare your cover letter and for your interview.

7. Hiring manager name and contact information

- When the manager responsible for filling a position sees their name as the addressee in the cover letter, this usually reflects well on the applicant. As opposed to addressing the letter generically "To whom it may concern," the targeted cover letter shows that the applicant is resourceful in discovering who exactly to direct their pitch to and would be similarly resourceful in networking on the company's behalf in the

position they're applying to.

- Search out the company Contact and About pages to determine who would likely be in charge of hiring.
 - Some job postings will name whom to send applications to, in which case this is easy, but usually you have to dig for this, perhaps using LinkedIn.
 - If it's a larger company, look for head personnel in HR (human resources), recruiting, or operations.
 - If it's a small business, the hiring manager is more likely to be the CEO, director, or owner.
- If this information is not available on the job posting and you can't find it on the website, try calling the company and ask to whom you can address your cover letter for the job application (Guffey et al., 2016, p. 398).
 - Calling the company shows that you are proactive and resourceful in getting the information necessary to succeed, shows that you care about what the company wants, and is a good networking play.
 - Calling also provides you with an opportunity to ask about their preferences for cover letters (do they want them or not?) and résumés (one page or two? reverse-chronological, functional, or combination résumé? what else do they like to see in them?) so you can tailor yours accordingly.
 - If they refuse to divulge this information, respect that they want to protect the identity of the hiring manager so that applicants can't influence them outside of the standard hiring process. If this is the case, "Dear Hiring Manager" is an acceptable alternative salutation in the cover letter.
- Use this information for your cover letter and preparing for your interview; also consider if this person is worth working for by examining their LinkedIn profile and whatever else you can find online. After all, a hiring process is a two-way street where both employer and applicant assess each other for compatibility.

8. Job posting URL and screenshot

- Copy and paste the web address (URL) for the job posting into your notes and, to retrieve it easily, hyperlink the address by positioning your cursor at the end of it and hitting the spacebar (or highlight, type ctrl + k, and paste in the URL into the web address field).
- Just to keep a record of the job posting for future reference, especially if the posting is taken down after the application window expires and you need to review it ahead of the interview, insert a screenshot (Take-a-screenshot.org, 2014) of the job posting below the URL. You may need two or three screenshots to cover the full scroll-down length of the posting webpage.

Making a habit of keeping such a record of the jobs you're serious about and that you have a good chance of hearing back from will set you up for success. Applications that don't address what the posting asks for because

the applicant didn't strategically note what that was, however, will likely be disposed of electronically before a human even sets eyes on them.

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9.1.3: Traditional Job Search Techniques

Despite the convenience of online job searches and applications, they aren't nearly as effective on their own as traditional in-person networking. Much of the daily operations of a business involve employees being present in a workplace or going into the field and working with or for others, not secluded entirely in a technology bubble. With its emphasis on soft skills, only traditional networking can give employers the convincing first impression that a job candidate would be productive in such interactions. Since the majority of hiring happens as the result of networking in its various forms, begin cultivating a professional network in the following ways:

1. Be friendly, outgoing, and supportive of your peers in your college classes. Though it's partly true that you'll be competing with your classmates for jobs when you graduate, you may also rely on them for recruiting opportunities. Say a classmate you know quite well landed their dream job with a reputable company soon after graduation. Six months later, that company is hiring again. Who's going to alert you to the opportunity? Who's going to coach you on what the employer prefers to see in résumés, cover letters, and interviews? Who's going to put in a good word for you with the hiring manager? If you can count on an inside friend or colleague being supportive because they are familiar with you and know you will perform well in that position, your path into that job is so much easier than without that guide.

If you spend your college years passing through like a ghost, however, focusing exclusively on your academic performance and shunning all social activities, you will miss valuable opportunities to connect with the people that may be your coworkers and even managers in your future workplaces. If they are in positions to help you but recall that you just kept to yourself in your old college days, they probably won't want to recommend you to the company because they recognize that your lone-wolf attitude will set you up to fail in that organization.

2. Ask your instructors and program coordinators for advice. Some instructors and program coordinators are highly invested in the success of their students and are eager to recommend them to their industry contacts as a way of assisting their recruitment efforts. This only works, however, if the student has the courage to ask for those connections and recommendations.

3. Attend industry conferences and network with participants. Joining a professional association and attending its meetings and conferences will give you ample opportunities to network with employers and their recruiting agents. As in the previous scenarios, this only works if you are friendly and outgoing. Conference participants who merely soak in others' presentations and discussions without networking are effectively invisible to the recruiters.

4. Attend career fairs and sign up for interviews with visiting recruiters. Colleges have tight connections with industry partners because they are a greenhouse for the emerging labour pool. When

company recruiters come around, be there to ask them about the opportunities they bring. Recruiters aren't interested in students who aren't interested in them. Attending career fairs and talking to recruiters is a great way of showing interest. (Guffey, Loewy, & Almonte, 2016, pp. 383)

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Key Takeaway



Preparing a winning cover letter and résumé begins with assessing your skills and researching what employers are looking for, what jobs are available, and how to find and apply to them.

Exercises



1. Use several of the job search engines listed in §9.1.3 above to collect about half a dozen job postings that you would be interested in applying to if they were available upon graduation. If you can't find any in your local region, look further afield in neighbouring cities or even other provinces or countries you'd be interested in moving to. Compare the various postings. Identify common terms used in the lists of required skills and job duties. What are the common work experience and educational qualifications identified as required or as assets?
2. For one of the postings you collected for Exercise #1 above, the one you would be most interested in applying to, write a set of notes organized around the eight points listed in §9.1.3 above.

References

Guffey, M., Loewy, D, & Almonte, R. (2016). *Essentials of business communication* (8th Can. ed.). Toronto: Nelson.

Take-a-screenshot.org. (2014, July 18). How do I take a screenshot? Retrieved from <https://www.take-a-screenshot.org/>

9.2: RÉSUMÉS AND ONLINE APPLICATIONS

Learning Objectives



1. Represent skills, knowledge, and experience realistically for employment purposes.

A résumé is the central document of your job application because it's what employers focus on most when judging an applicant's suitability for doing the job they're hiring for. Does the candidate have the right combination of core and soft skills to do that job? Did they acquire those skills with the right combination of education, employment, and other experience? Are they able to put a document together in a clear, concise, correct, organized, and reader-friendly way? Unable to appear in person to make the pitch at this point, the applicant's résumé conveniently answers these questions. It's convenient because (1) it proves the applicant's writing ability and (2) interviewing every applicant in person about their skills would be logistically impossible. The goal of the résumé, then, is to convince the employer to include you in the small selection of candidates they will interview to find the right person for the job.

Can you get to an interview without it? Sometimes a small-business owner will sidestep usual human resources (HR) best practices and hire without placing too much emphasis (if any) on the résumé. In most cases, however, the résumé is key to the hiring process. As said in the Ch. 9 introduction above, if that process is a communications test, the résumé, packaged along with the cover letter, is the written component. Sometimes one writing mistake—even just one little typo (LedgerLink, 2009)—can fail you out of the running so you don't proceed to the oral component (the interview). Employers demand perfection in the résumé for the following reasons:

1. Enough applicants set the quality bar high by delivering a flawless résumé. When the hiring manager's task is to whittle down a pile of a hundred applications to about five for interviews, even one writing mistake in a résumé gives them the reason they're looking for to dump the résumé in the shredder, thinning out the pile a little further. They might even feel vindictive about it because a résumé riddled with errors is insulting; it says to the employer: "I'm not bothering to fix up my résumé because you're

not worth my time.” This is why writing errors often rank as hiring managers’ #1 pet peeve (Vandegriend, 2017). If 90% of résumés have errors and can be shredded upon first sight of one, the hiring manager’s job of sorting through a hundred applications then becomes selecting the five most qualified from among the ten flawless ones remaining after the quality-of-writing cull.

2. A perfect résumé speaks volumes about how conscientious a job applicant can be about the quality of work they do. If a résumé is poorly written, the employer can safely expect a similarly poor quality of work if the applicant became an employee. That may be untrue and unfair, but the employer has nothing else to go on besides this document and the cover letter to make a snap judgment about whether the applicant would be suitable in the position. A perfect résumé shows that the applicant cares about what the employer wants, knows how to deliver it, and could potentially continue to do the same if hired.

Employer expectations are high and rising. Gone are the days where a printed résumé was all you were responsible for. Today you must also project a professional image online in whatever employers find when they Google-search you—because they almost certainly will. Even your electronically submitted résumé must be written with a consideration of the electronic filters employers use to scan applications and pre-select only those that truly answer the job posting’s call. This chapter section will help you increase your chances of getting to interview for the job you’ve been training so hard for by writing a résumé that meets employer expectations.

Résumé Topics

- 9.2.1: Generic Résumés
- 9.2.2: Targeted Résumé Parts
- 9.2.3: Résumé Formatting and Submission

9.2.1: Generic Résumés

Since 93% of employers Google-search job applicants to see how they present themselves in social media differently from their application (Jobvite, 2014, p. 10), a two-pronged approach to professionalizing your web presence is absolutely necessary. First, remove anything that makes you look unprofessional. Adjust your privacy settings to minimize your personal presence in public searches. In Facebook and Instagram, for instance, this means setting your entire profile to private (available only to friends) except what the sites force you to make public. Since over half of recruiters have reconsidered a candidate based on what they see on social media (Jobvite, 2014, p. 11), your publicly available profile picture, for instance, should be a decent headshot rather than a beach-party pic of you guzzling beer in a revealing swimsuit.

Second, professionalize your social media presence by actively posting career-oriented content that will be the first “hit” employers see when they Google-search you. When this content takes the form of a résumé, it’s

a “passive” one in that you put out a generic version for people to find rather than a targeted one in response to a job posting. In combination, passive and targeted résumés can be a winning combination. On its own, however, a passive generic résumé is useless. Consider the following strategies for how to win an interview with a combined approach to résumé building.

Generic Résumé Topics

- 9.2.1.1: An Effective Passive Generic Résumé: Your LinkedIn Profile
- 9.2.1.2: What’s Wrong Sending a Generic Résumé? —It’s Spam

9.2.1.1: An Effective Passive Generic Résumé: Your LinkedIn Profile

If you haven’t done this yet, professionalize your web presence by assembling a well-developed LinkedIn profile. The site and others offer plenty of advice on how to make the most of the social media platform, so search a few out to get a picture of the consensus on what makes for a successful profile. A good, current place to start is *The Most Effective Ways to Use LinkedIn* (Doyle, 2018) because it links you to several in-depth guides for building each aspect of your profile.

If you’ve done this already, show potential employers that you’re fully committed to your profession by continually updating your profile as the site adds and develops features. Keep building your network and adding content related to your field. Show that you engage in professional activities online because you’re a motivated professional rather than toss a profile together as a one-time exercise because someone told you to.

As you gain more professional experience throughout your career, add it all to your LinkedIn profile to make it a master CV (“curriculum vitae,” meaning “course of life” in Latin) from which you can extract targeted résumés for particular job applications. It’s okay if your targeted résumé and CV cover the exact same content in the beginning of your working life because you won’t have much to put in either; employers will understand that when they see the year you graduated from college. As you gain more experience and can be picky about what you include in a targeted résumé, however, your LinkedIn CV will provide employers with a fuller picture of what you’ve been doing with your life. They will be impressed that (1) you were able to present to them a slice of that history relevant to the job at hand, and that (2) you’re so much more well-rounded than your targeted résumé lets on. They’ll see that you have depth.

- Return to the Generic Résumé Topics menu
- Return to the Résumé Topics menu

9.2.1.2: What's Wrong Sending a Generic Résumé? —It's Spam

To be competitive in any fierce job competition, a generic résumé—i.e., the kind that you made a hundred

copies of to get your first job and handed out to every shop on the street that had a “Help Wanted” sign in the window—just isn’t going to cut it. Indeed, it ranks among the top 10 pet peeves of hiring managers (Vandegriend, 2017) because, like spam, generic résumés just give the busy hiring manager more useless junk to sort through. Even a well-developed passive résumé like a LinkedIn profile isn’t enough on its own. (Don’t be surprised if your LinkedIn message inbox isn’t flooded with job offers if you do nothing other than post your profile.)

To have any chance of succeeding in this game, actively apply to job postings and make your applications stand out with superior quality, knowing that your application will be just one of dozens, perhaps even hundreds, vying for interview spots. When an employer goes through the pile of applications that make it past the electronic filters, the résumés targeted specifically at that job make the generic ones look like they showed up to a gunfight with pocketknives. Along with those marred by glaring errors, generic résumés are the first to go into the shredder. They annoy hiring managers because they mean more work, but they’re easy to spot and reject when the goal is to thin out the pile.

Can you land a job with a generic résumé alone? If you’re somehow what a small business without dedicated HR personnel is looking for regardless of what your résumé says, sure, you can get that job mostly by networking your way into it. If you’re up against some serious competition in a strict, application-based hiring process driven by sound HR practices that seek to eliminate bias, however, anything less than a targeted résumé doesn’t stand a chance. What is a targeted résumé, then?

- Return to the Generic Résumé Topics menu
- Return to the Résumé Topics menu

9.2.2: Targeted Résumé Parts

A targeted résumé is the result of the job applicant tailoring their résumé to present nothing more or less than what the job posting asks for. An employer’s job posting is a wish-list of all the skills and qualifications that would set up the applicant for success in the position advertised. It also informs the selection criteria the employer applies to every job application. This way, every application is measured objectively for how well it reflects what the job posting asked for, as well as how current and well-presented it is. The employer expects that each section will prove that the applicant is perfect for the job, as well as meet general expectations for quality of writing—clarity, conciseness, correctness, and accuracy—as well as document readability and organization.

You have three options for types of résumé based on your situation and what the employer wants, each defined by how they organize the content:

1. Reverse-chronological résumé: For each experience section (Education, Employment, and Related), this résumé lists your professional activities starting with the present or latest (most recent) at the top and

your first (oldest) at the bottom. A key feature is a column with date ranges in months and years beside each educational program, job, and relevant activity you've done. This presents the hiring manager with a snapshot of where you're at right now in your professional development, how you got there, and where you came from.

Reverse-chronological résumés can be revealing in ways that might not cast you in an entirely positive light. Exclusively short-term employment and significant gaps in your work and educational history will raise red flags (Vandegriend, 2017). These will make the reader wonder (1) why you're not able to keep a job for long (are you chronically unsatisfied in your work? incompetent? unlikeable?) and (2) what you were doing in those gaps. Were you in jail? Unemployed and playing video games in your parents' basement all day? None of these characteristics and scenarios are appealing to employers. Luckily, there are alternative ways of organizing a résumé.

2. Functional (a.k.a. competency- or skills-based) résumé: Rather than organize the résumé around experience sections measured out in months and years, the functional résumé makes important skills the subheadings. The bullet points that follow explain in more detail what each skill entails, how it was acquired through training or education, and how it was practiced and applied professionally. The functional résumé is ideal if you have questionable gaps or durations in your employment or educational history because it omits or de-emphasizes date ranges.

3. Combination functional and reverse-chronological résumé: This is the most popular form and the basis for the guide on targeted résumé parts given below. It uses the reverse-chronological format for the standard experience sections showcasing the applicant's educational and employment history but adds a Skills and Qualifications Summary at the beginning to highlight the applicant's abilities and credentials that match what the job posting asked for.

Some employers have strong preferences for one résumé type. Helpful employers will specify which they prefer in the job posting. If not, however, your only recourse is to contact the company and ask what their preferences are. Rather than cheating, this shows that you care enough about meeting employer expectations to be proactive on the communication front. Employers hope you'll do the same as an employee—as opposed to guessing at expectations and potentially wasting your time and effort, as well as company money, doing something no one wants. Let's look in detail at how you can make your résumé meet common (but not necessarily all) employer expectations in all parts of a combination reverse-chronological/functional targeted résumé.

Targeted Résumé Parts

- 9.2.2.1: Personal Information Header
- 9.2.2.2: Objective Statement
- 9.2.2.3: Skills and Qualifications Summary
- 9.2.2.4: Education
- 9.2.2.5: Employment Experience
- 9.2.2.6: Related Experience

- 9.2.2.7: References

9.2.2.1: Personal Information Header

The personal information header appears at the top of the document because its most important piece, your name, is your document's title, not "Résumé." Use your full legal name so that, if you're the leading candidate, it will make the employer's job of due-diligence background checks (e.g., police record checks, checking academic transcripts for proof of credentials, etc.) easier. (If you go by a nickname, you can certainly state your preferences after you get the job.) Also use a larger font size, bold typeface, and even colour to make your name stand out from the rest of the text. Don't make it so large that it looks like you have an out-of-this-world ego, however; a 15-point font, compared with the 11- or 12-point font you use for the rest of the text, is perfect.

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Figure 9.2.2.1: Sample Personal Information Header

Below or beside your name, add your contact information, including your physical mailing address, phone number, and email address. If you have multiple addresses and phone numbers, use only those that the employer can best reach you with. Use a one-line address in the following format:

[Street #] [Street Name] [Street Type], [City or Town], [Provincial Abbreviation] [two spaces] [POSTAL CODE]

- Add "Canada" at the end only if you're applying internationally.
- Fully spell out the street type rather than abbreviate it (e.g., Avenue, not Ave.) to strike a formal tone.
- Separate the provincial abbreviation from the postal code with two spaces, not a comma.
- Place a space in the middle of the six-character alpha-numeric postal code.
- Use commas only before and after the city or town (see §7.1.3 above for more on standard business address format).

Whatever phone number you give, ensure that the personalized message that a caller hears if they're sent to voicemail is a professional one (see §10.1.4.3 below for more on setting a personalized message).

Use a standard email address like yourfirstname.lastname@emailprovider.com or your college email address to prove you went to the school given in your résumé's Education section (see §6.1.1 above). Don't use an unprofessional email address like cray-cray.tay-tay@yahoo.com or macdaddy.playa@hotmail.com; that email address is fine for using with close friends who share your sense of humour but not with an employer. Also,

don't use your work email address unless your current employer is okay with you using it to look for work elsewhere since they'll have access to those emails. Finally, space permitting, include a personal website such as a link to your LinkedIn profile and/or online portfolio. Make it easy for hiring managers to find whatever else you want them to see of you online besides what they search out themselves.

Don't overload your personal information header with inappropriate or too much information, however. To avoid inviting various types of bias into the selection process or information that might be exploited, never include the following details:

- Your **Social Insurance Number (SIN)**: Give this to the employer only when you've accepted a job offer and they require your SIN for payroll processing.
- Your **age**: Don't give employers a reason to make biased assumptions about the quality of work you'll do based on your age. Some employers consider employers who are too young or too old to be liabilities. You want to at least plead your case in an interview rather than be discriminated against during application selection.
- Your **ethnicity** or place of origin: The employer will inevitably make certain assumptions—positive or negative—based on what your full name says about your ethnicity, but the personal information header isn't the place for you to say anything about it either way. Many organizations have an affirmative-action clause that gives special consideration to applicants who are traditionally underrepresented in the workforce. Only indicate your ethnicity or sex if an online application questionnaire asks if you identify as a minority.
- Your **sexual orientation**: If this matters at all (99.9% of the time it doesn't), it's something you can discuss during the interview if you want.
- Any disability: To prevent inviting ability bias into the employer's assessment of your employability, leave out any mention of disabilities or health conditions.
- Your **picture**: Unless it's an industry expectation, such as in the entertainment business, your physical appearance shouldn't matter at this stage—only your words. Avoid inviting lookism bias into the selection process. The employer can always look you up on social media; otherwise, they will see you at the interview.

Putting it all together, your personal information header should be only two-to-three lines on the page and placed in the document header so that it goes automatically on every page and leaves more room below. Spreading that information out across the header is a more efficient use of space than stacking each piece of information to make a five- or six-line block. To look fresh, some résumé templates place the information in a column in the margin or even near the bottom. This may backfire because, if most employers expect to see that information at the top and don't see it at first glance, they might discard the application thinking the applicant simply forgot to put it there. No matter how good a résumé is, there's no point reading on if the applicant can't be contacted. Stacking your personal information on the side may be okay for someone with a one-page résumé

that lacks depth of experience, but any résumé that goes onto a second page should have the that information in the header so it appears uniformly at the top of every page.

- Return to the Targeted Résumé Parts menu
- Return to the Résumé Topics menu

9.2.2.2: Objective Statement

When the Objective statement mentions the company and position in question, it's the first sign confirming to the employer that this résumé is targeted. Like someone on a date who makes the other feel special by saying that they're interested only in them, the Objective statement singles out the employer as the applicant's priority. Whereas a generic résumé may call this "Career Objective" and declare a long-term career goal, a targeted résumé's Objective statement focuses on what exactly the applicant can do for the employer. Convention requires that this be a one-line infinitive-verb statement that helps the employer understand that your priority is to help them achieve their business goals. Not a complete sentence, an infinitive verb phrase begins with "To" and follows with a present-tense first-person verb such as the one given in Figure 9.2.2.2 below.

OBJECTIVE

To contribute to an increase in sales at Company XYZ as a top sales representative.

Figure 9.2.2.2: Sample Objective Statement

- Return to the Targeted Résumé Parts menu
- Return to the Résumé Topics menu

9.2.2.3: Skills and Qualifications Summary

The Skills and Qualifications Summary section follows the Objective because of its importance in declaring in one neat package the major skills and qualifications that match those in the job posting. In a combination résumé, it's the feature borrowed from the functional résumé type. If the job ad lists four main skills—let's call them skills "ABCD"—the candidates who list skills ABCD in this section will have the best chance of getting an interview because they frontload their résumé with all the top-priority items the employer seeks. Doing this shows you can follow instructions and says to the employer, "I read your job posting and am confident that I'm what you're looking for."

If you have skills ABC and omitted D even though you have that skill, you could lose the competition for interview spots to those who were conscientious enough to add it to the list. If you have skills ABCDEFG, adding EFG will appear to be a résumé-padding distraction. You can put EFG in your CV on LinkedIn but

listing only ABCD here makes this a truly targeted résumé. If you have ABC but adding D would be dishonest because you don't have that skill, just go with ABC; don't let the fact that you don't have everything the employer is looking for stop you from applying. If you shoot yourself down for every job application because you have only about 80% of what they're looking for, you will self-sabotage yourself out of almost every employment opportunity. Apply anyway because the employer may have asked for too much and will find that no applicant has ABCD, which means they'll shortlist candidates with three out of four.

Your Skills and Qualifications Summary section helps you pass the filter that many employers use to scan electronically submitted applications to ensure they've used enough of the job posting's key words. Filtering out applicants merely taking shots in the dark gives the busy hiring manager more time to focus on those who truly qualify. Don't worry about this being plagiarism. If your application fails to mirror exactly the key terms listed throughout the job posting, the employer might not even see yours.

Dividing the Skills and Qualifications Summary into sub-lists related to categories of the job will increase your chances of meeting the employer's approval. To use this highly prized real estate on the page effectively, consider arranging the sub-lists in three columns; a couple could be for job-specific technical skill sets, another for transferrable soft skills. Make a three-cell, single-row, borderless table from MS Word's Insert menu with a centred bold heading and bulleted list of skills in each cell. Only do this, however, if you're sure that your application formatting won't be electronically filtered out. Some of the online application services offered through job search engines such as Indeed will convert résumés into scannable formats, often scrambling text into an unreadable mess. Converters are the bane of applicants who spend time carefully formatting for readability and space efficiency (TERRIBLE Resume Converter, n.d.).

Begin with a short paragraph of noun phrases (not complete sentences) profiling where you are in your career with relevant credentials, such as in Figure 9.2.2.3 below.

SKILLS AND QUALIFICATIONS SUMMARY

A recent graduate of the three-year Game Development Advanced Diploma at Algonquin College in Ottawa, Ontario. A video game developer specializing in programming and project management but with additional proficiencies in level design and asset modeling, as well as competence in user interface design.

Programming Language	Software	Interpersonal
<ul style="list-style-type: none"> • 3 years' advanced proficiency in C++ • 2 years' intermediate use of C# • 1 year of familiarity with OpenGL 	<ul style="list-style-type: none"> • 3 years' advanced proficiency with 3ds Max • 5 years' functional proficiency with Photoshop • 2 years' familiarity with Java 	<ul style="list-style-type: none"> • Excellent leadership and teamwork skills • Advanced writing and presentation skills • Fully bilingual (reading, writing, speaking) in English and French

Figure 9.2.2.3: Sample Skills and Qualifications Summary

9.2.2.4: Education

Whether your Education section or Employment Experience section immediately follows your Skills and Qualifications Summary section depends on which is more relevant to the job you're applying to. If you're applying to a job that directly relates to the college program you've just graduated from, then you want the employer to see that before your work history because it's more recent and relevant. The order of information matters because the hiring manager is scanning each résumé quickly to get through the pile of applications. They make quick judgments about which to discard and which to consider for an interview. If the Employment section precedes the Education section but has jobs unrelated to the position in question, it's a strike against the application.

List your education in reverse-chronological order with the program title and credential type as your bold subheading followed by the institution and its location in plain style either on the same line or on the line below. The program title precedes the institution because it's more relevant in proving that you've trained for the job at hand. Give the date range in months and years near the margin. If you're still in the program, put "Present" or your expected graduation date—e.g., "April 2020 (expected)."

EDUCATION

Game Development Advanced Diploma
Algonquin College, Ottawa ON

Sept. 2015 – Apr. 2018

- Overall GPA of 3.97 in courses including Programming Fundamentals, Game Algorithms, Graphics Computations, Assets, Level Design, Scripting, Project Management, and Communications
- Gameplay programming in C++, C#, Java, OpenGL, Unity, and Unreal
- Asset design and animation using 3ds Max, Substance Painter, and Photoshop
- Collaborated in the production of a fully functioning FPS video game

Pre-Animation and Illustration Certificate
Algonquin College, Ottawa ON

Sept. 2014 – Apr. 2015

Figure 9.2.2.4: Sample Education Section

In the sub-points under the program title subheading, include your overall grade-point average (GPA) if it's above 3.5 on a 4-point scale (high-A average), which proves to employers that you've had a strong work ethic throughout your training when you have more industry-relevant training than work experience. Be honest because the employer may request an official college transcript, and any discrepancy between the numbers there and on your résumé will end your candidacy. Drop the GPA line when you have 3-5 years of successful work experience in the same type of job you apply to.

In the list of subpoints, include course titles that prove how you learned the skills identified in the job

posting and in your Summary section. If the titles alone don't have the same wording as those sought-after skills, include further points that do. The wording is vital because your application can be electronically filtered out if it doesn't contain enough matching key terms in the job posting. Once a human reads the résumé and they're not convinced you've proved where you learned, practiced, and applied the skills they're looking for, they may deprioritize and ultimately reject your application. When you have enough industry-relevant work experience (e.g., 5-10 years) for the jobs you apply to, you can shift the skills learned in your training to go instead under the jobs you've actually done, leaving your Education section as simply a list of credentials.

Omit your high school in the list of educational experience. Even if you recently graduated, to an employer it's redundant padding because being in a college program proves that you completed high school. Also, showing when you graduated gives away your age, which may introduce some age-based discrimination into the selection process (see §9.2.2.1 above). If you want to list participation in high-school clubs related to your field of study, do it in the Related Experience section.

Add other programs you've completed, even if they're not directly relevant to the job, just to show what you've been doing with your time. If they didn't provide you with any skills matching those in the job posting, omit sub-points under them. If you didn't finish a program, including it depends on whether it provided you with any skills that match those in the posting. If so, add it. If not, leave it out. When employers check your LinkedIn profile, they'll understand that you omitted an unfinished program from your targeted résumé because it didn't relate enough to the job at hand.

- Return to the Targeted Résumé Parts menu
- Return to the Résumé Topics menu

9.2.2.5: Employment Experience

The Employment Experience section follows the same format as the Education section, only with the job title as the subheading in bold followed by the company name and location in plain style. List your jobs in reverse-chronological order with your current (or most recent) job first and your earliest last. List the month/year date ranges in the same position as in the Education section. The months are important because a date range such as "2015-2016" is misleading if you worked a few weeks before and after New Year's, whereas "Dec. 2015 – Jan. 2016" honestly indicates seasonal work.

EMPLOYMENT EXPERIENCE

Student Support Representative, Student Support
Services
The AC Hub, Algonquin College, Ottawa ON

Apr. 2016 – Present

- Provide effective customer service in supporting student and faculty clientele

Sandwich Artist, Person in Charge, Subway
Rideau Centre Food Court, Ottawa ON

Jul. 2014 – Apr. 2016

- Managed staff and conducted quality-control inspections
- Ensured customer service satisfaction through direct interaction and team motivation
- Fostered effective teamwork among staff by role-modeling and conflict resolution

Figure 9.2.2.5: Sample Employment Experience Section

At the beginning of your working life, include whatever jobs you've done (except perhaps newspaper or flyer delivery) but make them relevant by adding transferrable skills as subpoints underneath. While you should omit task-specific skills (e.g., in Figure 9.2.2.5 above, there's no mention of food preparation), definitely list transferrable skills (e.g., teamwork) that match those listed in the job posting. As you can also see in Figure 9.2.2.5, each bullet-point skill begins with an action verb for consistent parallelism, the verb for the present job is in the present tense, and those for the past job are consistently past-tense verbs (see §5.2.2.3 above for more on parallelism). Use clear, high-impact action verbs such as the following:

Achieved	Coordinated	Expanded	Innovated	Provided	Served
Analyzed	Corrected	Expedited	Introduced	Reduced	Spearheaded
Approved	Delegated	Facilitated	Investigated	Represented	Spurred
Averaged	Designed	Grew	Managed	Resolved	Streamlined
Collaborated	Directed	Implemented	Organized	Restructured	Strengthened
Constructed	Enabled	Improved	Overhauled	Reviewed	Supervised
Contributed	Engineered	Increased	Pioneered	Revitalized	Targeted
Converted	Established	Initiated	Prioritized	Screened	Transformed

Fleshed out into bullet-point descriptions of skills in a three-part **verb + object + prepositional phrase** structure, some of the above action verbs may look like the following:

- **Collaborated** with team members consistently in working groups improving departmental processes
- **Streamlined** collaborative report-writing processes by switching to Google Docs
- **Organized** annual awards dinner celebration for a department of 150 employees
- **Designed** 13 internal feedback forms in the company intranet for multiple departments
- **Secured** government program funding successfully for eight departmental initiatives

Notice that the writer focuses on quantifiable achievements with actual numerical figures and places adverbs after the verb rather than begin points with them (e.g., not *Consistently collaborated with team members*) so that you always lead with verbs (Guffey, Loewy, & Almonte, 2016, p. 387). To make your accomplishments more concrete, Google executive Laszlo Block advises you to structure them according to the following formula:

Accomplished X as measured by Y by doing Z

Even if your job is just a grocery store cashier, you can quantify your achievements and put them in perspective. Instead of “Processed customer purchases at the checkout,” saying “Served 85 customers per day with 100% accuracy compared to my peers’ average of 70 customers at 90% accuracy” demonstrates your focus on achieving outstanding excellence with regard to KPIs (key performance indicators), which hiring managers will love (Block, 2014).

As you add more industry-specific work experience throughout your career, you can move those transferrable skills to go under only career-oriented entries in this section and delete non-industry-related work experience. For instance, you would delete food service industry jobs such as Subway if your career isn’t culinary in nature. A decade or two into your working life, you’ll have a solid record of only career-oriented work experience in résumés targeted to career employers.

The gold standard of experience that employers want to see in a résumé is that you’ve previously done the job you’re applying for—just for another employer (Vandegriend, 2017). This means that you can carry on in the new position with minimal training. If that’s the case, you certainly want to place your Employment Experience section above your Education section. Otherwise, recent college graduates should lead with their more relevant Education section, appealing to employers hiring for potential rather than for experience, until they get that industry work experience.

- Return to the Targeted Résumé Parts menu
- Return to the Résumé Topics menu

9.2.2.6: Related Experience

The Related Experience section gives you a chance to match any of the skills listed in the job posting that you haven’t yet matched in either of the Education or Employment Experience sections. It also helps prove that you’re a well-rounded candidate who has developed the soft skills that employers value. (Merely listing such skills in the Qualifications Summary is suspicious unless you later list experiences that suggest you developed them in a formal way. Without the proof, the employer may just think that you’ve copied a list of soft skills off a generic résumé model.) The Related Experience section is organized in the same manner as the other two experience sections above it, using subheadings for categories such as the following:

- Volunteer activities
- Unpaid work experience (e.g., co-op)
- Certifications (e.g., First Aid, WHMIS)
- Memberships in professional associations or community organizations
- Honours and awards (for merit, not won by luck)
- Extracurricular activities

Beneath each subheading, list specifics (e.g. First Aid and WHMIS as bullet points under Certifications). Omit mere hobbies and interests but include league sports if the job posting included teamwork skills as a requirement and you match that in the bullet point beneath the entry. Use a single month-year combination for one-time events and date ranges for longer-duration activities. Drop the least relevant from targeted résumés as you gain experience over the years while keeping them in your LinkedIn profile.

- Return to the Targeted Résumé Parts menu
- Return to the Résumé Topics menu

9.2.2.7: References

In the context of the résumé, references are former employers who can vouch for you as a quality employee when asked by the employer you've applied to. You have two options for how to fill out your References section:

1. Simply say “**References available upon request**” under the heading “References” following the Related Experience section. This option is best if the employer is a larger organization that will follow a strict HR-driven hiring process and will ask you for references only if you're the leading candidate after all the interviews. In the meantime, avoid including your references' confidential information, especially if you're worried about who you're submitting your résumé to when you apply to an online job posting. Will they protect that confidential information? How do you know?
2. Include a References section with actual entries when applying to a smaller organization that will likely make quick decisions about hiring. In those situations, providing your references' contact information will allow the employer to call up the people who have agreed to endorse you to do quick background checks before finalizing their decisions. Withholding the references so that they have to call you to ask for them slows down their process. If they're between you and another leading candidate, the one who provides the References in the résumé and gets a solid endorsement looks better than the one who required them to do more work for the same information.

If you include actual references, put them all on one page at the end of your application document so they can be separated out and shredded at the end of the hiring process.

Three or four references is best, and each must be someone who was in a position of authority over you, such as a manager or supervisor, for at least two years, ideally. The assumption is that less than two years is not enough time to fully assess the consistency of an employee's work ethic. List your references in order of what you expect to be the most enthusiastic endorsement down to the least. Do not include coworkers, friends, or family members among your references. If your parents or relatives were your employers (e.g., on the family farm), include them as references only if they're your only work experience. As soon as you have enough non-

family work experience, drop your parents or relatives from the list. An employer seeing endorsements from people with the same last name might assume that they'll be biased to the point of being useless as references.

Each reference must contain the following pieces of information:

1. **Full name in bold**, followed by a comma and the reference's official job title capitalized (e.g., Manager, Supervisor, CEO, or Franchise Owner)
2. **Company** or organization they represent (or represented when you worked under them, though they've since moved on to another company) in plain style. It's important to give the name of the company so that the reader can connect it to your Employment Experience section. If you worked for a company but don't have a reference for it, the reader might suspect that you did so poor a job that the employer refused to give you a strong reference. This is why you should always do your best work in any job; even if you don't enjoy the work, doing your best increases your chances of getting a good reference that you can use as your ticket to a better job.
3. **Phone number**. Employers checking references prefer to call, rather than email, so they can have a quick back-and-forth conversation about the candidate. The caller will rely on important clues such as voice tones for assessing the honesty of the reference's endorsement, which wouldn't be possible in a non-verbal email.
4. **Email address**. This is only for the potential employer to set up a time for a phone call with the reference or to ask for details in writing if a phone call is somehow difficult or impossible (e.g., time-zone differences or international calling charges). Consider, however, that managers or supervisors might hesitate from endorsing anyone in writing, which is why the telephone is the preferred channel here.

It's very important that you confirm with your references that they will provide you with a *strong* endorsement (use those words when you ask) if called upon by a potential employer. Don't be afraid to ask. Providing references is part of a manager's or supervisor's job. They got to where they are on the strength of their former employers' references, and there's a "pay it forward" principle motivating them to do the same for the employees under them. If they don't believe in your potential, they'll likely be honest in advising you to ask someone else. Bear in mind that some larger corporations have HR policies that prohibit managers from providing references because of myriad legal implications. They may only be allowed to confirm that you worked for them but nothing more. If so, consider asking other managers or supervisors for more helpful references.

- Return to the Targeted Résumé Parts menu
- Return to the Résumé Topics menu

9.2.3: Résumé Formatting and Submission

When all your content is in place, ensure that your résumé is impeccably organized, revised, and proofread. According to one study surveying hiring managers, the top three deal-breaker reasons for rejecting a résumé are the following:

1. Spelling or grammar errors
2. Lack of targeting
3. Disorganization (Vandegriend, 2017)

Since even one typo can ruin your chances of being selected for an interview (LedgerLink, 2009), no documents you've ever written in your life should be as thoroughly revised and proofread as your résumé and cover letter. To ensure perfection, follow the editing process described in Ch. 5 above and the points below.

Résumé Formatting and Submission Topics

- 9.2.3.1: One Page or Two?
- 9.2.3.2: Format for Ease of Readability
- 9.2.3.3: Electronic, Scannable, and Hard-copy Submissions

9.2.3.1: One Page or Two?

A common employer expectation requires you to fit all of your details on one page. If this means cutting details that might convince an employer to invite you to an interview, then only do this if you're sure that an employer will discard your résumé if it goes over a page. If you see "Send your one-page résumé now!" on the posting, that's your cue for the required length. Even if an employer isn't so strict, any details that spill onto the second page will, according to the Law of Diminishing Returns, work against you if they don't effectively convince the employer to invite you to an interview. The busy hiring manager speed-reading through dozens or hundreds of applications will be annoyed by any time-wasting padding in a résumé, and the slightest annoyance is enough to prompt them to dump your application in the shredder.

- [Return to the Résumé Formatting and Submission Topics menu](#)
- [Return to the Résumé Topics menu](#)

9.2.3.2: Format for Ease of Readability

Ensure that your résumé is easy to read in every way. Trying to fit everything on a single page by reducing the

font size to 8-point and the margins to 1cm, as well as using multiple columns to fill every square centimeter of available white space, will just annoy the reader. They'll suspect that you'll be similarly disrespectful to your readers on the job, so they may simply shred your résumé after a mere glance at its formatting. Follow the guidelines for effective document design in §4.6 above (except §4.6.6 on visual aids, which your résumé shouldn't have). Ensure especially that your:

- Text is a standard 11- or 12-pt. font type with sparing use of colour, all-caps, and bold typeface (just for headings and subheadings); avoid italics and underlining
- Margins are between 2.54cm (1 in.) and 3cm all around and empty on the sides
- Text and whitespace are balanced without leaving large gaps
- Pages are numbered (paginated) if you have more than one; ensure that the page number font is consistent with that of the rest of the document since MS Word will resort to the default font for page numbers
- Return to the Résumé Formatting and Submission Topics menu
- Return to the Résumé Topics menu

9.2.3.3: Electronic, Scannable, and Hard-copy Submissions

If the employer requires an **electronic submission**, follow their directions exactly. If they ask for a PDF or MS Word file named a certain way (e.g., Resume_Yourlastname_Yourfirstname.docx or .pdf), doing it any other way will disqualify you immediately. (The reason is obviously that if you can't follow simple instructions for submitting your résumé, you'll have problems taking direction in the workplace—problems that can potentially be expensive to the employer.) If you have a choice between MS Word or PDF, go with PDF because it embeds fonts and formats, so you can be reasonably sure that you'll avoid issues with font conversion or format scrambling when your document is opened on another computer.

If the employer uses a job search site such as Indeed, beware that your résumé formatting will be stripped out by their scannable résumé converter. Avoiding the nightmare scenario of the employer seeing your résumé massacred by the converter and thinking it's your fault (TERRIBLE Resume Converter, n.d.) by doing the following:

1. Produce a version of your résumé that uses no formatting whatsoever—no bullet points, no tabbing, no columns, no bold typeface, no colour, no changes in font size, etc. If the converter can't do this properly for you, doing it manually yourself will ensure that the employer sees a readable (albeit homely) version.
2. Use Indeed (or other search engines) to find job postings but send your well-formatted application directly to the company either via email or traditional mail.

Try these approaches in combination to ensure the employer gets your application.

If the employer uses an **online application form**, having the simplified version recommended in #1 above ready to copy and paste into the given fields will make your work much easier. This is especially necessary if the form will time out to prevent applicants writing from scratch as they go. Don't forget: when employers use these electronic filtering methods, it's for no other reason than to have the program scan the résumés and filter out the generic spam applications that fail to meet a given quota of the job posting's key terms. The program sends along only the targeted résumés to the hiring manager, so ensure that your résumé content features those key terms (see §9.2.2.3 above) and doesn't crowd them out with much else.

If the employer requires a **hard-copy submission**, it may be worth going to an office supply store to invest in some high-quality paper and printing. When the employer sees stacks of applications printed on standard paper stock, one printed on quality paper really stands out. High-quality printing also shows respect, suggesting that the employer was worth the extra expense. Also, put an 8.5" x 11" cardboard backing in with your application when you mail it in a 9" x 11.5" envelope to ensure that it won't be creased in transit. High-quality writing and convincing content printed on pristine, high-quality paper is a winning combination in the eyes of any hiring manager exhausted by the disappointing quality of the majority of applications.

- Return to the Résumé Formatting and Submission Topics menu
- Return to the Résumé Topics menu

For more on résumés, see the following resources:

- Introduction to and Expectations for Résumés (Purdue OWL, n.d.) and the modules following
- How to Make a Resume (wikiHow, 2018)

Key Takeaway



Targeted résumés *perfect* in the quality of their content, organization, writing, and overall presentation increase your chances of getting interviews and hence the jobs you apply to.

Exercises



1. Compare the advice given on targeted résumés throughout this section to those in the alternative resources linked a few lines above. You can also find dozens more guides on how to write a résumé online, so include any of them in your comparison. Between all of these, you'll see differences in opinion regarding matters of formatting, style, and other minutiae. Identify those differences and provide reasons for going with the advice of this or any other guide for each part of the résumé you intend to write.
2. If you haven't done so already, put together a LinkedIn profile after reviewing §9.2.1.1 and following its guide links. If you have a LinkedIn profile already, update it and add industry-related content that will show an ongoing commitment to your field of study.
3. Following up on the preparatory work you did in Exercises 1-2 at the end of §9.1.3 above, write a targeted résumé for the job posting you chose. Moving forward, you can use this as a model for how to excerpt a targeted résumé from your generic CV.

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9.3: COVER LETTERS

Learning Objectives



1. Represent skills, knowledge, and experience realistically for employment purposes.

Because the cover letter literally covers the résumé and is thus the first thing the hiring manager sees of you, it plays key role in convincing them to consider your application. Besides introducing the résumé and requesting an interview, the cover letter is a sales pitch explaining how you will benefit the company you're applying to. In the communications test that is the hiring process, it also proves that you can put coherent, persuasive sentences and paragraphs together when writing formally on the employer's behalf. The cover letter must be flawless because, like the résumé that follows it, even one writing error could be read as a sign of the poor quality of work to come and prompt the hiring manager to save time by shredding it immediately.

An important distinction in the content between the résumé and cover letter is that the former is focused on your past, the cover letter on your future with the company. Many job applicants wastefully use the cover letter to express in sentences what they listed in point-form in their résumé. To be persuasive, however, the cover letter must convince the employer that you will apply the skills and qualifications developed through previous work, education, and other experience to your future job. They want to see how you think you'll help meet their business goals and fit the company culture. If you answer the "What's in it for us if we hire you?" question that hiring managers direct towards any cover letter, you increase your chances of getting an interview.

Is a cover letter even necessary? In cases where you know that the employer thinks they're just a waste of time, then you can obviously skip it. Sometimes job postings will helpfully clarify whether they want a cover letter or not. What if they don't say either way, though? The safe bet is to write a cover letter as part of your targeted approach to the job application. It'll show the hiring manager that you've made the extra effort to explain how well you suit the job and give them more information to make a well-informed decision about you. Adding a cover letter looks better than all the applicants who didn't bother. We'll see below how the various parts of the cover letter can certainly help sway the hiring manager toward adding you to the interview shortlist.

Cover Letter Topics

- 9.3.1: Cover Letter Format
- 9.3.2: Cover Letter Message Parts
- 9.3.3: Cover Letter Editing and Submission

9.3.1: Cover Letter Format

Should you format the cover letter in the personal modified-block style or standard block style? As we saw in §7.1.1 above, these two styles differ first in how they present the sender's address. The personal modified-block letter simply has the sender's two address lines at the top but tabbed so that their left edges line up along the vertical centre of the page. At the bottom, the signature block's left edge also lines up with the vertical middle of the page. The modified-block-style format is acceptable if you're required to submit your cover letter as a separate file in electronic submissions.

Even better, however, would be if you did a block-style letter with a stylized letterhead much like companies have—only your name is the company—in the header and used it consistently across your cover letter and résumé. If you've put a personal letterhead in the header of your résumé (see §9.2.2.1 above) and can add your cover letter to your résumé file by making it the first page, then the letterhead appears automatically at the top. If so, then adding your address below the letterhead is unnecessary. From there, you would simply follow the format of a block-style letter (see §7.1 above). Keep it down to one page so you don't exhaust the busy reader's patience, unless of course you know for sure that they want more detail in a second page.

9.3.2: Cover Letter Message Parts

As a direct-approach message, the cover letter generally follows the AIDA pattern of persuasive message in its four paragraphs:

A for Attention	States emphatically what job you want and that you qualify
I for Interest	Summarizes how you will apply your skills and qualifications
D for Desire	Explains why you're interested in the company and job itself
A for Action	Requests that the reader consider you for an interview

Let's look in more detail at how to write each of these four cover letter paragraphs plus surrounding parts.

Cover Letter Message Parts

- 9.3.2.1: Opening Salutation
- 9.3.2.2: Opening Job Identification

- 9.3.2.3: Skills and Qualifications Summary
- 9.3.2.4: Employer Preference
- 9.3.2.5: Closing Action Requests

9.3.2.1: Opening Salutation

The most impressive cover letters address the hiring manager formally by name in the opening salutation (Guffey et al., 2016, p. 398). “Dear Ms. Connie Jenkins.” tells the employer right away, “Take me seriously because I’m a targeted résumé” compared to the droves of applications introduced by generic cover letters beginning with “To whom it may concern:” or, worse, with no introductory cover letter at all. If the job posting said whom to address your application to, doing this gives you an early lead in the competition because it shows that you can follow orders, which not everyone does.

If the job posting made no mention of who the hiring manager is, finding their name also shows that you’re resourceful and conscientious because you care about finding the right person to deal with—qualities employers love. You may have to dig for that information on the company website or by Google-searching for the company’s HR or recruiting personnel and confirming that you have the right people using LinkedIn page results. However, you can’t be sure that you have the right person this way, and naming the wrong person could backfire.

Perhaps the best strategy is just to call the company or even pay them a visit and ask to whom you can address your application. This is ideal because you can confirm the correct spelling and also ask for other employer preferences. Ask if a cover letter is necessary in the first place and what kind of résumé they prefer—reverse chronological, functional, or a combination. Doing this shows that you care about what the employer wants, which, by extension, suggests you’d do the same for the customers, managers, and co-workers you work for and with. It also gets your name on their radar. If the same person whom you talked to on the phone or met in person reads your application, you will have some valuable name recognition working for you.

If you discover instead that the company has hidden the hiring manager’s identity too well, however, it’s best to give up before getting too resourceful and looking like a hacker or stalker. Appreciate that many organizations prefer to keep the identity of the people responsible for hiring a mystery until the best job candidates meet them for the interview. This helps ensure an uninfluenced and unbiased hiring process. In such cases, “Dear Hiring Manager” is a perfectly acceptable opening salutation.

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9.3.2.2: Opening Job Identification

If your cover letter responds to a job posting, its first paragraph should be a brief couple of sentences that do no more or less than the following:

1. State the official **job title** of the position you're seeking, as well as the reference number if one was provided in the job posting. Get right to the point by saying emphatically, "I am applying with great enthusiasm for the position of . . ." or "Please accept this application submitted with keen interest for the position of . . ." Don't waste the reader's time with redundant lead-ins such as "I'm Todd Harper and I'm applying for . . ."; they can see your name at the top and/or bottom of the page.

If the job posting included a reference number, include it in parentheses after the job title. Also include it in the bolded **subject line** above along with the job title (see §7.1.4 above). Employers use job reference numbers to direct applications to the correct competition, especially if the company is large enough to run several at once. If you give the reference number, you'll show the reader that, in accommodating their bureaucratic needs, you are conscientious and considerate.

2. **Say where you found out about the job** in the first sentence after naming the job title. If you know someone in the company and they recommended that you apply, name-dropping works well here if they will give you a strong recommendation to the employer and their opinion matters. Even if you don't have an "in" from networking, say where you found the job posting or if a recruiter recommended it. Again, this shows that you are considerate in providing the employer information they're interested in. They will use this to determine where their job advertising money and efforts are being well directed. If most applicants say they found out about the job from a certain job search engine and not at all through another, then the employer will switch their focus to the popular job site and drop the other with the next competition (Guffey et al., 2016, pp. 398-399).

3. **State that you're qualified** for the position by asking the hiring manager to read onward. Be courteous in this request. A concluding sentence such as *Please consider the following application for details regarding how I meet the required qualifications for the position* nicely introduces the following paragraphs and résumé.

If your cover letter introduces an **unsolicited application**—i.e., it's a "cold call" prospecting for work rather than responding to a job posting—take a more indirect, persuasive approach than the direct one advised above. Start by asking if the employer is in need of someone who can do what you do, then detail the skills you have that will benefit the employer.

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9.3.2.3: Skills and Qualifications Summary

Use your second paragraph to explain how you'll apply the skills you've learned and practiced throughout your educational, work, and other experience to benefit the employer in the position you're applying for. Getting right to the point with this in a solicited application (responding to a job posting) is vital because anything you include that doesn't instantly convince the employer that you have what they're looking for is going to sink your application quickly. Avoid the trap of simply repeating and stretching out the Skills and Qualifications Summary section of your résumé into full sentences.

Make the paragraph instead about how you're going to benefit the employer, using those skills to help the company achieve its business goals, which requires knowing and saying what they are. This is why you were advised to research the company at the outset of the application process and note their products and/or services, clientele demographics, and mission/vision statement (see §9.1.3 above). Show that you know what they want and have the necessary skills to deliver exactly that. If you convince the employer that you bring a skill set to the table that will set you up for success in the position right away (with only minimal mandatory training), you're a step closer to the interview. If you list skills that only partially mirror what the posting asks for (or, worse, not at all), however, you've moved your application a step closer to the shredder.

The biggest mistakes that job applicants make here is (1) simply summarizing their résumé with an repetitive *I did this, I did that, I . . . , I . . . , I . . .* structure and (2) saying how the job will benefit them (the applicant, not the employer) by advancing their career. What the reader takes away from this application-killing combination is that the candidate is a self-involved Millennial stereotype who might exploit the job for experience and then move on quickly to something better. That may be far from your true intentions, but that's just what it looks like to the reader who hasn't met you and has only your small writing sample to go on. Avoid **"I" dominance** by using activities and outcomes as the subjects of sentences rather than I (Guffey et al., 2016, p. 402). For example, saying "Working closely with clients to customize training programs that work best for them informed my customer-centred approach to fitness training" helps you escape the I-dominant phrasing of "I developed a customer-centred approach to fitness training by working closely with clients to customize their training programs."

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9.3.2.4: Employer Preference

Though many applicants meet the required baseline qualifications for the job, only those who look like they

will be a good “fit” in the company or organization culture will be invited for an interview. The paragraph that follows the qualifications paragraph is crucial to convincing the employer that you’ll fit in nicely. To assure the employer you will be truly happy in that position, say what attracts you to it and to the company in general. Perhaps you have been a customer in the past and were really impressed by the product or service and the people you dealt with, and now you want to participate in the effort to make more satisfied customers like you’ve been. Saying that your priority is to make the company’s customers and stakeholders happy, perhaps by paraphrasing the mission or vision statement available on their website and making it your own, goes a long way toward convincing the employer that you’re their kind of people.

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9.3.2.5: Closing Action Requests

End your letter’s message concisely with two or three sentences that do the following:

1. **Thank the reader** for considering your application. Politely phrase this as a request to read on to the next page: *I very much appreciate your considering me for this position. Please review the attached résumé for a more detailed explanation of how I meet or exceed the required qualifications.*
2. **Request an interview.** Since winning an interview spot for a chance to get a job offer is the entire goal of the application, make your intentions clear by stating your desire to talk in person. You can say that you look forward to meeting and discussing further your “fit” in the organization, since that’s exactly what they’ll be doing with the interview. Though some cover letter writing guides advise ending with confidence, saying something like you’ll be contacting them to arrange an interview or, worse, thanking them in advance for the job offer to come or asking when you can start the job will appear entitled in the worst way. Any statement that assumes certain victory looks like you’re saying that this opportunity is owed to you rather than earned. An important part of being courteous here at the letter’s closing is being humble.

When completing the letter’s standard formal parts in the signature block, strongly consider using an image of your handwritten signature by following the procedure explained in the left column of Table 7.1.10. Also, don’t forget the **subject line** with the job title (e.g.: “Re: Powerline Technician position, ref. no. OHA-532B-18”; see §7.1.4 on letter subject lines) above the opening salutation and **enclosure notice** (i.e., “Enclosure: Résumé”) on the very last line of the page.

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9.3.3: Cover Letter Editing and Submission

As with the résumé, where even one error can potentially sabotage all your efforts, the cover letter must be *perfect*. Put in the extra effort making it convincing and absolutely flawless following Chapter 5's advice on revising and proofreading. Enlist trusted others to review it also, ideally anyone you know in management positions.

Since most employers ask that you submit applications by email or by uploading them to a company website, following their instructions to the letter is essential. As discussed at length in §9.2.3.3, an error such as not naming your file exactly as the employer requests is enough to disqualify your application. If you're emailing it, is a cover letter still necessary or can you introduce your résumé in the email message itself? Given that people generally don't like long emails, even the few paragraphs that make up a cover letter can stretch a reader's patience if emailed (recall the difference between letters and emails summarized in Table 2.3 and explored in more detail in §6.1 and §7.1 above). You also want the cover letter to prove that you can write formally. For these reasons, always write a cover letter for a job that you're serious about and attach it along with your résumé, either as a separate file or together with your résumé according to employer preference, when emailing or uploading your application.

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For more on cover letters, see the following resources:

- What Is a Cover Letter? (Olson & Brizee, 2011) and the modules following
- How to Write a Cover Letter (wikiHow, 2018), including sample cover letters

Key Takeaways



Write a cover letter as part of your targeted approach to applying for job competitions you really want to win; use it to identify the job by name, introduce your résumé, explain how you'll apply your skills in the job at hand, and request an interview.

Exercises



1. Write an unsolicited cover letter for your dream job. Take the indirect approach and be convincing in how you present your pitch.
2. Following up on the application-building exercise begun with Exercises 1-2 at the end of §9.1.4, write a solicited cover letter to introduce the targeted résumé you wrote for Exercise #2 at the end of §9.2.3.3.

References

Guffey, M., Loewy, D., & Almonte, R. (2016). *Essentials of business communication* (8th Can. ed.). Toronto: Nelson.

Olson, A., & Brizee, A. (2011, December 14). What is a cover letter? Purdue OWL. Retrieved from <https://owl.english.purdue.edu/owl/resource/549/01/>

wikiHow (2018, May). How to write a cover letter. Retrieved from <https://www.wikihow.com/Write-a-Cover-Letter>

CHAPTER 10: INTERPERSONAL WORKPLACE COMMUNICATION

Jordan Smith

Chapter Learning Objectives

1. Define professional behaviour according to employer, customer, coworker, and other stakeholder expectations.
2. Explain the importance of ethics as part of the persuasion process.
3. Define and provide examples of sexual harassment in the workplace, as well as strategies for how to eliminate it.
4. Identify and provide examples of eight common fallacies in persuasive speaking.
5. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
6. Explain how to use your voice effectively in professional situations.
7. Identify the five stages of a conversation and general strategies for improving conversation skills.
8. Communicate effectively by telephone in a professional manner.
9. Identify successful strategies for job interview preparation.
10. Explain how best to answer standard and behavioural job interview questions.
11. Define intercultural communication in the context of professional interactions.
12. Explain the process by which we join and participate in a culture such as in the workplace.
13. Identify dimensions of cultural difference from a sociological perspective.
14. Explain strategies for how to establish and maintain friendly professional relations with people from different cultures.

We've been focusing so far almost entirely on writing in the workplace, but you can be a highly skilled writer and still not "make it" in your profession if you don't have the oral communication skills to back you up. Despite all the sophistication of our skill with the written language and writing technologies, they are all

extensions of a natural technology that we can't do without. Just as a wheel improves upon what our feet do and a hammer upon our fists without replacing them, our writing technologies don't replace our voice. Indeed, they make the uses to which we put our voices all the more important. When you look at the job application process, for instance, the written component (résumé and cover letter) will get you in the door, but it's the in-person, face-to-face conversation you have for the oral component (the interview) that will ultimately get you the job.

In a world gone mad for technology, we still value the human element of our face-to-face interactions most. Though online shopping has stolen some of the retail market share from brick-and-mortar stores, the vast majority of business interactions require in-person contact—not just at the customer-to-business front end, but especially in the back end of internal office operations. The advantages of in-person workplace collaboration will protect those face-to-face interactions for a long time to come, as well as require that everyone in the workforce have high-level or communication skills. Divided into the following topics, this chapter focuses on the one-on-one aspect of those “soft” skills.

- 10.1: Verbal Communication and Conversation
- 10.2: Professional, Etiquette, and Ethical Behaviour
- 10.3: Job Interviews and Follow-up Messages
- 10.4: Intercultural Communication

10.1: VERBAL COMMUNICATION AND CONVERSATION

Learning Objectives



5. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
6. Explain how to use your voice effectively in professional situations.
7. Identify the five stages of a conversation and general strategies for improving conversation skills.
8. Communicate effectively by telephone in a professional manner.

Your professional success depends on having advanced people (a.k.a. “soft”) skills because most jobs require you to talk to people. Key among these is skill in speaking to and conversing with others in person. Retail sales, for instance, requires the ability to listen carefully to what a customer says they want and “read” their nonverbals to determine what exactly to say and how to say it in order to close the deal with a purchase. Aside from a handful of jobs with minimal human interaction (Gillett, 2016), the vast majority require advanced soft skills to deal effectively with customers or clients, coworkers, managers, and other stakeholders. Though we’re not born with them, everyone has the capacity to learn, develop, practise, and apply verbal and nonverbal skills to benefit those audiences, their company as a whole, and themselves.

You’ve certainly participated in countless conversations throughout your life, and the process of how to conduct a conversation may seem so obvious that it needs no explanation. Still, you can tell that some are better than others at conversation and some argue that technology is preventing many from developing these skills, so it’s worth breaking down how an effective communicator approaches the art of conversation. A skilled professional knows when to speak, when to go silent and listen, as well as when stop speaking before the audience stops listening. Further, understanding conversation provides a solid foundation for this guide’s crucial advice on job interviews (see §10.3 below), which follow similar ritual patterns and have their own set of expectations. Though these expectations may differ depending on the field, level, knowledge, and experience, they generally follow the five steps of a basic conversation discussed in this section. First, however, it’s worth

examining the voice as the pre-eminent communication channel, how to refine our interpersonal skills in the face of the stunting effects of problem technology use, and how to use voice-only technology effectively.

Verbal Communication and Conversation Topics

- 10.1.1: Your Voice as Your Most Essential Communication Tool
- 10.1.2: The Five Stages of a Conversation
- 10.1.3: Improving Your Conversation Skills in the Smartphone Era
- 10.1.4: Telephone and Voicemail

Before diving into these topics, however, let’s review what face-to-face meetings are all about according to the Table 2.3 channel selection guide above.

Table 2.3 (excerpt): In-person Meetings at a Glance

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
In-person conversation	<ul style="list-style-type: none">• The most information-rich channel combining words and nonverbal messages• Dialogue facilitates immediate back-and-forth exchange of ideas• Maintains the human element lacking in most other channels• Additional participants can join for group discussion	<ul style="list-style-type: none">• Requires that speakers travel to be physically in the same space together• Some people are poor listeners and some are poor speakers• Impermanent unless recording equipment is used	<ul style="list-style-type: none">• Audience must be present and attentive rather than distracted by their mobile technology or multitasking• Use for genuine dialogue rather than monologue or shallow, superficial exchanges• A dynamic speaking ability is required to engage audiences	<ul style="list-style-type: none">• Quickly exchange ideas with people close by• Visually communicate to complement your words• Add the human element in discussing sensitive or confidential topics that need to be worked out through dialogue

10.1.1: Your Voice as Your Most Essential Communication Tool

We had hundreds of thousands of years to develop our voice as a communication tool until we added writing to the channel mix relatively recently about 5,000 years ago. Your voice continues to enjoy a privileged place in your communication toolbox, being the first one you use in your infancy when you cry for food and attention the moment you're born. Since then, you've developed richly expressive verbal skills that make your voice your most essential communication tool.

Your voice has qualities that cannot be communicated in written form, and you use these to your advantage when interacting with colleagues. If you're sending a general informative message to all employees, an email may serve you well, but if you're honouring an employee for receiving an industry award, your voice conveys your heartfelt congratulations much better than the written word (*Business Communication for Success*, 2015, 16.5). When trying to make a point very clearly and emphatically, slowing down your pace so that the listener focuses on each word, raising your volume to jolt the listener into paying closer attention, and dropping your pitch to sound more authoritative all have advantages over using all-caps, bold, italics, and/or underlining in an email, which altogether can look angry rather than emphatic. For sheer expressiveness and precision in communicating meaning, your voice is your go-to communication tool.

How your voice quality, volume, and pitch affect your listener's understanding of the message's content is instrumental especially for persuasive messages. Delivering a message with a happy and enthusiastic tone will have a much different impact than serious or sad tones. In most business situations, it is appropriate to speak with some level of formality, yet avoid sounding stilted or arrogant. Your voice volume should be normal but ensure your listeners can hear you. If your audience includes English learners, speaking louder and shouting don't help them understand you any better compared with accessible word choices delivered in a normal tone (see §4.5.1.2 above). Use simple words and short, active-voice sentences of 10-to-20 words, as well as avoid idioms (figures of speech) that don't translate literally (§2.2.1). Pitch refers to the frequency of your voice, which you can raise or lower for effect. A pleasant, natural voice will have some variation in pitch—raised for lighthearted quips and lower for serious statements—to communicate nuances of meaning and keep the listener engaged. A speaker with the flat pitch of a robotic-sounding monotone voice tends to bore their listeners because they sound bored themselves (*Business Communication for Success*, 2015, 15.2). Modulating your volume and pitch helps communicate the emotional spin of your messages, making the spoken communication channel an incredibly rich one.

Why, then, is the voice falling into disuse? Why are so many people afraid of using their voice for public speaking and even shy away from one-on-one interaction? Though you probably recognize the importance of literacy and numeracy to your academic and professional success, your schooling probably hasn't impressed upon you the importance of oracy, and your reliance on writing technology such as texting on your smartphone hasn't helped either. If you're encountering this word for the first time, **oracy** is skill in speaking

and reasoning aloud, such as using evidence to make a persuasive argument, as well as collaborative teamwork through conversation. This is what employers expect employees to do, but there's little direct focus on it in school curriculum, and hence some anxiety around group speaking into the high-school and college years (Mercer, Ahmed, & Warwick, 2014; McKenna, 2017). For the sake of your future employability, then, let's focus on Conversation 101 by breaking down how we achieve goals through dialogue.

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10.1.2: The Five Parts of Conversations

Conversation is one of the main ways we interact in the business environment and yet it's highly susceptible to miscommunication and misunderstandings. Our everyday familiarity with conversations often makes us blind to the subtle changes that take place during the course of a conversation. Examining it will help you to consider its components, predict the next turn, anticipate an opening or closing, and make you a better conversationalist. Steven Beebe, Susan Beebe, and Mark Redmond (2002) break conversation down into five stages that we will adapt here for our discussion.

10.1.2.1: Initiation

As the first stage of conversation, initiation requires you to be open to interact and perhaps use small talk to prime yourselves for the intended topic. You may communicate openness with nonverbal signals such as approaching someone, stopping four feet away, facing them, making eye contact, and smiling. When a degree of unfamiliarity comes between the two speakers, small talk helps “break the ice” to clear a path toward the topic at hand. Asking how they're doing, a casual reference to the weather (“Nice day, eh?”) or a brief back-and-forth about the weekend requires someone to begin the exchange. For the very shy, this may trigger some anxiety whereas extraverts delight in this stage, and “ambiverts” (e.g., natural introverts who have learned to play the extravert game) do it in recognition of its necessity (Bradberry, 2016). If status and hierarchical relationships are a factor, cultural norms may determine who speaks when. Usually, however, initiation just requires a willingness to engage in conversation and a purpose—something to talk about after clearing the small-talk hurdle.

10.1.2.2: Preview

The preview (a.k.a. “feedforward”) verbally or nonverbally indicates the conversation topic. A word or two in the subject line of an email performs the same job, but in conversation this can be done as easily as just summarizing the topic in a few words (e.g., *Can I ask you about how I can minimize my tax liability?* or *Let's*

talk about some basic heavy-equipment safety guidelines before we get started). People are naturally curious and also seek certainty, so a preview conveniently reduces uncertainty by taking a direct approach (see §4.1.1 on the direct approach in writing) to signal the speaker's intent.

A general reference to a topic may also approach a topic indirectly, allowing the recipient to either pick up on the topic and to engage in the discussion or to redirect the conversation away from a topic they aren't ready to talk about. For instance, a manager needing to talk to an employee about being late for work too often might start off by saying, "That was some nightmare traffic on the highway this morning, eh?" Depending on the employee's response, the manager could then say what they do to get to work on time, suggesting that the employee should do the same. To reinforce the point, the manager could finally explain that continuing to arrive late will affect the employee's job security. The savvy communicator would be able to infer from the initial question about traffic where the manager's going with this line of questioning and may even begin to offer up a convincing excuse for why they're late and suggest a compromise such as a plan to stay later or make up the lost hours by working from home on the weekend.

10.1.2.3: Business

You get down to business when you reinforce the goal orientation of the conversation. In workplace communication, we often have a specific goal or series of points to address, but we can't lose sight of the relationship messages within the discussion of content. You may signal to your conversation partner that you have three points you need to cover, much like outlining an agenda at a meeting. This may sound formal at first, but in listening to casual conversations, you'll often find a natural but unacknowledged list of subtopics leading to a central point where the conversational partners arrive. By clearly articulating the main points, however, you outline the conversation's parameters to keep it efficiently on track rather than prone to digress from the main point.

10.1.2.4: Feedback

Similar to the preview stage, this feedback allows speakers to clarify, restate, or discuss the talking points to arrive at mutual understanding. In some cultures the points and their feedback may recycle several times, which may sound repetitious in the West where speakers typically prefer to get to the point and move quickly to the conclusion once they've achieved understanding. If so, then a simple "Are we good?" might be all that's necessary at the feedback stage. Communication across cultures, on the other hand, may require additional cycles of statement and restatement to ensure understanding, as well as reinforcement of the speakers' relationship. Time may be money in some cultures, but spending time is a sign of respect in cultures with rigid social hierarchies (see §10.4 below for more in intercultural communication). The feedback stage

offers an opportunity to make sure the information exchange was successful the first time. Failure to attend to this stage can lead to the need for additional interactions, reducing efficiency over time.

10.1.2.5: Closing

Accepting feedback on both sides of the conversation often signals the transition to the conversation's conclusion. Closings mirror the initiation stage in that they can be signalled verbally (e.g., "Okay, thanks! Bye") or nonverbally, such as stepping back and turning your feet and body in the direction of where you're about to go next in preparation to disengage while still facing and speaking with the other.

Sometimes a speaker introduces new information in the conclusion, which can start the process all over again. If words like "in conclusion" or "okay, one last thing" are used, a set of expectations is now at play and the listener expects a conclusion in the very near future. If the speaker continues to recycle at this point, the listener's patience will be stretched and frustration sets in. They will have mentally shifted to the next order of business, so this transition must be negotiated successfully to maintain good relations between speakers. Mentioning a time, date, or place for future communication clearly signals that the conversation, although currently concluded, will continue later. "I'm just heading to a meeting right now but I'll catch you back on the fifth floor tomorrow afternoon, K?" for instance, allows you to respectfully disengage (*Business Communication for Success*, 2015, 16.5).

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10.1.3: Improving Your Conversation Skills in the Smartphone Era

If you prefer to text rather than talk to people most of the time because that's how you've (and everyone else has) been doing it throughout high school and even in college, you'll probably find yourself at a disadvantage when entering the workforce. The reason is twofold: (1) When you enter the working world, you join several generations of adults who grew up without smartphones and therefore tend to prefer talking over texting because it's a tried, tested, and true way to efficiently communicate understanding. Managers, coworkers, customers, and other stakeholders come with high expectations for the quality of conversational skill in the people they interact with, and have little patience for those who are years behind where they should be in basic oracy (see §10.1.1 for more on oracy). (2) You could be addicted to technology, which negatively affects your ability to interact with people in person according to a growing body of research (Andrew-Gee, 2018; Smith, Robinson, & Segal, 2018; Brandon, 2018). Why talk to people when sending a text is just so easy and comfortable?

In her book *Reclaiming Conversation: The Power of Talk in a Digital Age* (2015), psychologist Sherry Turkle draws on clinical research to show how profoundly dissatisfied with ourselves and each other technology has

made us. Smartphones and social media apps promise to connect us more but effectively isolate us. After a decade of smartphone use, teenagers whose 10-hour-per-day addiction to screens, preference for texting over talking, and habit of filling every idle moment with media consumption arrive at college with under-developed skills in conversation, empathy, patience, and self-reflection. When teens use technology to shield themselves from the countless awkward, embarrassing, and regrettable in-person interactions that, by a slow learning process, lead eventually to social competence and confidence, they enter the workforce in a state of arrested development. “Adulthood” becomes a terrifying prospect compared with the protective comfort zone of the screen. Turkle’s guide offers an antidote to the socially stunting effects of technology.

Motivational speaker Simon Sinek presents similar advice to Millennials while sympathizing with them for the “bad hand” they were dealt by a “failed parenting strategy” that raised unrealistic expectations of fulfillment in a whole generation. He similarly points the blame at mobile devices for the short-term dopamine-hit micro-reward feedback-loop pleasures they offer at the expense of the long-term development of soft skills. The enchantment of social media is that it offers users an easy out from the difficult learning experiences that develop the social coping mechanisms helping them through the trials of adolescence. The devices hook you with instant gratification: “Everything you want you can have instantaneously,” he says,

except job satisfaction and strength of relationships. There ain’t no app for that. They are slow, meandering, uncomfortable, messy processes. . . . What this young generation needs to learn is patience—that some things that really matter like love or job fulfillment, joy, love of life, self-confidence, a skill set—all of these things take time. . . . The overall journey is arduous and long and difficult. (8:08 – 9:25)

[https://www.youtube.com/watch?v=hER0Qp6QJNU&t=488s\[/embed\]](https://www.youtube.com/watch?v=hER0Qp6QJNU&t=488s[/embed])

Sinek advocates for better leadership in business and industry to teach Millennials the social skills they were robbed of by constant access to addictive technology.

One practical solution Sinek offers is banning cell phones in meeting rooms to remove the temptation of using them rather than conversing with colleagues. He argues that relationships and trust are built especially through small talk about work and life before and after meetings. Additionally, innovation happens in idle moments when you notice opportunities in the world—opportunities you’re blind to when your attention is absorbed by a little screen. “We have to create mechanisms where we allow for those little innocuous interactions to happen” (12:00 – 13:05). Rather than a quick fix, steady consistency in developing social skills is necessary to bring Millennials up to speed in oracy.

[https://www.youtube.com/watch?v=hER0Qp6QJNU&t=720s\[/embed\]](https://www.youtube.com/watch?v=hER0Qp6QJNU&t=720s[/embed])

If anything in the above paragraphs sounds true to life, the onus rests largely on you to improve your conversation skills with all the advice that is available (ironically) on the very devices in question. For instance, we can draw on a very accessible TEDtalk by Celeste Headlee, a talk-radio host and author of *We Need to Talk: How to Have Conversations That Matter* (2017). We’ll adapt her well-viewed speech *10 Ways to Have a Better Conversation* (2016) for our own purposes below and build on them with a few points of our own.

[https://www.youtube.com/watch?v=R1vskiVDwl4\[/embed\]](https://www.youtube.com/watch?v=R1vskiVDwl4[/embed])

1. **Be Present:** Devote your undivided attention to the person you're speaking with and don't multitask. You won't have to pretend to pay attention by nodding and making eye contact if you're doing that anyway by actually paying attention. The worst offenders are those to whip out their phone and engage with it rather than the people around them, called "phubbing" (for "phone snubbing") (Ducharme, 2018). Though you may feel that you can get away with phubbing in your college classes by discreetly hiding your cell phone under your desk, your instructor knows exactly what you're doing when all your attention is on your lap. The rudeness of it will likely get you slightly blacklisted—or fully blacklisted if you do it too much.
2. **Be prepared to learn:** A conversation is a dialogue, not a monologue where you simply unload your opinion on someone and receive nothing in return except for the satisfaction of dominating them with it. In certain situations, such as a TEDtalk itself, you give up your right to speak because of the faith that you'll learn much more by listening to a wise speaker who needs time to get their points across.
3. **Ask open-ended questions:** The more vague your questions are (starting with the 5 Ws + H), the more freedom you give your conversation partner to answer on their own terms, whereas very specific questions limit the possible answers. If you ask "How did that make you feel?" for instance, you'll get a more expressive answer than if you limited your speaker to a yes or no answer with a question like "Did that make you happy?"
4. **Go with the flow:** Respond to your conversation partner's main points rather than with some digressive story you were reminded of by one of their minor points. When you respond in that way, it reveals that you haven't been listening past the part that inspired the barely relevant thing you feel contributes to the conversation, though it really doesn't move the conversation along so much as derail it.
5. **Admit to not knowing:** Make your confession of ignorance an opportunity to learn rather than claim to know something you don't.
6. **Honour the uniqueness of their experience:** When the speaker relates something that happened to them, resist the urge to make it about you by equating their experience with yours. If they're talking about grieving a death in the family, for instance, don't dishonour that information share by responding with how you felt when your dog died. It's not the same.
7. **Cut yourself off before repeating yourself:** If you have only one point to make, "hit it and quit it" rather than spin your wheels saying the same thing over and over, even if you change the words.
8. **Stay out of the weeds:** Rather than struggle to offer up all the details (the names, places, dates, etc.) and digress on minutiae, focus on your main points.
9. **Listen:** A conversation is a dialogue, not a monologue, and therefore requires that you actively pay attention to what the speaker says in order to understand it rather than to merely reply to it (see §1.5 above for more on active listening).
10. **Be brief:** People are busy and have things to do, so if your conversation detains them for longer than they have time for, you will stretch their patience. As Headlee says, "A good conversation is like a

miniskirt: short enough to retain interest, but long enough to cover the subject.”

Headlee concludes that these tips are all variations on being interested in what people have to teach you (TED, 2016). If you add the following to Headlee’s advice, you stand a good chance of improving your conversation skills.

10.1.3.1: Mirror the Speaker

You may have occasionally caught yourself automatically imitating your conversation partner’s posture, facial expression, and manner of speaking. When they look relaxed or lean in, talk slow because they’re calm or talk fast because they’re in a rush, or widen their eyes with excitement, you follow suit in every case. Coined the “chameleon effect” by psychologists, mirroring is unconscious physical behaviour motivated by our desire to fit in so our conversation partner identifies with and likes us (Chartrand & Bargh, 1999). It supports the cliché that imitation is the highest form of flattery, and happens not only for romantic partners but also for good friends and even workplace colleagues.

Though it happens unconsciously, mirroring deliberately has been found to be especially effective as a sales technique and in job interviews, though only if the person being imitated doesn’t notice the imitator doing it. If you can be subtle and natural about it, intentional mirroring forces you to read your conversation partner’s verbal and nonverbal messages closely. Done effectively, mirroring benefits both speakers by building the trust and rapport necessary to collaborate effectively or close a deal (Shellenbarger, 2016).

10.1.3.2: Correctly Pronounce Words and Names

Though it’s difficult for learners of English to get the hang of it, take care to carefully pronounce your words. State them the way native English speaker tend to speak them, especially those whose job is to speak, such as radio hosts and actors. An excellent strategy is to watch movies with subtitles to associate the written words with those heard, and then to imitate the pronunciation. When you get more familiar with the language, you can move up to listening to the radio, such as the CBC, and continue to work on the accent at a normal conversational pace without subtitles.

Even native English speakers should be careful with pronunciation, especially with words they rarely hear, if ever. Mispronunciation can negatively impact your reputation or perceived credibility. Instead of using complicated words that may trip you up, choose a simple phrase if you can, or learn to pronounce the word correctly before using it in a formal interactive setting (*Business Communication for Success*, 2015, 19.4). If you think you’ll stumble over a word like archipelago, for instance, just use a synonymous phrase such as *island chain*.

The importance of pronunciation is nowhere more important than with people’s names. Some take offense

to their name being mispronounced, and especially with their name being confused with a different but similar name. If someone's name looks unpronounceable on paper, simply asking them how they prefer their name to be pronounced is better than confidently mispronouncing it.

Be careful also with where stresses go when pronouncing words. Every word with more than one syllable has stressed and unstressed syllables. We pronounce the word *syllable*, for instance, by stressing the first syllable (*SIH*)—i.e., raising our volume slightly and spending a little longer enunciating it compared with the two following unstressed syllables (*lah-bul*), which we enunciate quicker and quieter. Stressing the middle syllable (*sih-LAH-bul*) would sound strange.

Be especially careful pronouncing words you've only seen in writing. If you've only ever read the fancy word *superfluous*, for instance, but never heard anyone say it aloud, you'd sound slightly silly pronouncing it in conversation by stressing the first syllable (*SOO-per-FLOO-us*) as you normally would when pronouncing the word *super*. Many online dictionaries such as Dictionary.com feature an audio button you can click on to hear the word pronounced correctly. In the case of *superfluous*, you can hear it pronounced properly with the stress on per with the other three syllables unstressed (*soo-PER-floo-us*).

10.1.3.3: Treat Conversations Like Volley Sports

A conversation isn't a monologue where you fire words at a wall until you have nothing left to say. It's more like a game of volleyball, tennis, or ping-pong where possession of the speech right is exchanged back and forth. If it's a friendly game, the objective is to volley words for as long as it's fun or productive. This may mean asking a good question, which lobs the speech over the net to your conversation partner. They answer and can either ask you a feedback question in return or you can respond to their answer with a statement. Every time you speak, you must set up your conversation partner to be able to respond with either a statement or question, and expect them to do the same. Conversations would be frustrating if all the other person did was either spike the ball repeatedly to score points against you so that you could never touch it (i.e., delivered a monologue where you couldn't get a word in edgewise), or just bounced the ball out of bounds every time you volleyed it straight to them—i.e., answered in a way that stalled the conversation, such as with one-word answers to your questions or bizarre statements you don't know how to respond to. A conversation must be a dynamic process where both sides make a determined, concerted effort to keep it going until the objective has been reached or the clock runs down.

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10.1.4: Telephone and Voicemail

The simplest form of audio-only conversation—i.e., talk stripped of all nonverbals—is a telephone call. A phone call is advantageous whenever you need the live volley of conversation with someone to sort out details

in a timely manner, but are too distant from them physically to do it in person. Some make the mistake of choosing written channels like email or text, drawing out the communication process over hours or days, to discuss matters that would take mere seconds or minutes by phone. As long as you don't need details permanently recorded in writing, phone is an expedient channel to discuss details for any busy professional.

Though you've probably talked on the phone countless times throughout your life, you may not yet have had the chance to do so professionally where the expectations for competence are much higher than in social or family contexts—so much so that some executives hire professional voice coaches to help them increase their effectiveness in phone communication. The importance of audio communication in business and industry has increased with the availability of conference calls, voice over internet protocol (VoIP), voice-activated electronic menus, and voice-to-text dictation software such as that in the Gboard (Google keyboard) app for smartphones. We'll examine below how to improve your phone game in an age where many prefer to text rather than call. First, however, let's review what the telephone and its modern adaptations are all about according to the channel selection guide we saw in Table 2.3 above.

Table 2.3 (excerpt): Telephone and Its Adaptations at a Glance

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Phone, VoIP, voicemail, and conference calls	<ul style="list-style-type: none"> • Enables audio-only dialogue between speakers anywhere in the world • Quick back-and-forth saves time compared to written dialogue by email or text • Can send one-way voicemail messages or leave them when the recipient isn't available • Can be conducted cheaply over the internet (with Voice over Internet Protocol [VoIP]) and easily on smartphones • Specialized phone equipment and VoIP enable conference calls among multiple users 	<ul style="list-style-type: none"> • Absence of nonverbal visual cues can make dialogue occasionally difficult • The receiver of a call isn't always available, so the timing must be right on both ends; if not, availability problems lead to "phone tag" • Time zone differences complicate the timing of long-distance calls • Possibly expensive for long-distance calls over a public switched telephone network (PSTN) if VoIP isn't available • Not always clear how long you have to leave a voicemail message, running the risk of being cut off if your message runs too long • Recording of conversations is typically unavailable unless you have special equipment 	<ul style="list-style-type: none"> • Follow conventions for initiating and ending audio-only conversation • For voicemail, strike a balance between brevity and providing a thorough description of the reason for the call and your contact information • Record a professional call-back message for voicemail when not available to take a call • Respond to voicemail as soon as possible since you were called with the hope that you would be available to talk immediately • Be careful with confidential information over the phone, and don't discuss confidential information via voicemail 	<ul style="list-style-type: none"> • For when quick dialogue is necessary between speakers physically distant from one another • Conference call when members of a team can't be physically present for a meeting • Use VoIP to avoid long-distance charges • Leave clear voicemail messages when receivers aren't available • When a record of the conversation isn't necessary • When confidentiality is somewhat important

10.1.4.1: Your Voice on the Phone

When you lack the nonverbal context of your conversation partner being able to see how you say what you say, take pains to ensure that your voice accurately communicates your message. Without nonverbals, your choice of words and how you say them, including spacing or pausing, pace, rhythm, articulation, and pronunciation are more relevant than when you talk in person. Consider these five points:

1. **Speak slowly** and **articulate your words clearly**. You don't have to slow down your normal pattern of speech much, but each word needs time and space to be understood or else the listener may hear words running together, losing meaning and creating opportunities for misunderstanding. For instance, numbers such as "18" may sound like "80" and vice versa if you're speaking too quickly and have an accent, which could lead to disaster if you're, say, discussing price in a six-figure real estate deal.
2. Use **vivid terms** to create interest and communicate descriptions. As we discussed briefly earlier on the topic of using the phone to deliver bad news (see §10.3.6 above), talking on the phone or producing an audio recording lacks an interpersonal context with the accompanying nonverbal messages. Unless you use vivid language and crisp, clear descriptions, your audience will be left to sort it out for themselves. They may create mental images that don't reflect your intended meanings and lead to miscommunication.
3. Be **specific**. Don't assume that they will catch your specific information the first time. **Repeat as necessary**, especially addresses and phone numbers.
4. Show consideration for others by keeping your phone conversations **private**. Avoid calls in a crowded elevator, for instance.
5. **Silence cell phones** and other devices when in a meeting or eating with colleagues. Recall Simon Sinek's explanation for why this is important (Crossman, 2016, 12:00 – 13:05).

As the response from the receiver to the sender, feedback is also an essential element of phone conversations. Taking turns in the conversation can sometimes be awkward when you can't see when your conversation partner is about to speak. With time and practice, each "speaker's own natural, comfortable, expressive repertoire will surface"
(Mayer, 1980, p. 21).

10.1.4.2: Telephone Conversation Organization

Recall from §10.1.2 above that conversations follow a predictable five-part pattern:

1. Opening
2. Preview

3. Business (a.k.a. talking points)
4. Feedback
5. Closing

Table 10.1.4.2 below illustrates what this would sound like in a phone conversation.

Table 10.1.4.2: Five-stage Telephone Conversation

Stage	Subevents	Example
1. Opening	<ul style="list-style-type: none"> Both parties identify themselves They exchange greetings 	<ul style="list-style-type: none"> [the phone rings] Ken: Hello, Ken Reilly speaking. Val: Hi, Ken. This is Val Martin from [company or department]. How are you? Ken: Fine, and you? Val: Fine, I'm doing great.
2. Preview	<ul style="list-style-type: none"> Substance of conversation Parties exchange roles 	<ul style="list-style-type: none"> Val: Here's the situation. [explains] I know you're good at resolving these kinds of issues, so I was wondering what you think I should do. Ken: Wow, I can understand how this has you concerned. Considering what you've told me, here's what I think I would do in your situation. [explains]
3. Business	<ul style="list-style-type: none"> Substance of conversation Parties exchange roles 	<ul style="list-style-type: none"> Val: Here's the situation. [explains] I know you're good at resolving these kinds of issues, so I was wondering what you think I should do. Ken: Wow, I can understand how this has you concerned. Considering what you've told me, here's what I think I would do in your situation. [explains]
4. Feedback	<ul style="list-style-type: none"> Signal that business is concluded 	<ul style="list-style-type: none"> Val: Ah, that makes sense. I'll certainly keep your ideas in mind. Thank you so much, Ken! Ken: Hey, you're welcome. Let me know how it turns out.
5. Closing	<ul style="list-style-type: none"> Both parties say goodbye 	<ul style="list-style-type: none"> Val: Yes, I will. Have a good weekend, Ken. Ken: You too, Val. Bye. Val: Take care. [they hang up]

10.1.4.3: Leaving and Receiving Voicemail

When you phone someone but are sent to voicemail because they don't pick up, switching to monologue mode means that you can only get as far as the preview stage of the conversation structure outlined above. You'd still open by saying hello, your full name, and company. The limit on how much recording time you have (30 seconds? 60?—you may not know) and absence of feedback from the listener, however, means that you can really only say what the call is about in concise, clear terms. A long, rambling voice mail message may be cut off and you may not even know it, as well as increases the possibility for misunderstandings without being present to clarify based on your listener's responses. Anything that needs discussion must be saved for the actual conversation, especially anything of a sensitive nature. Recording confidential information is potentially dangerous to you and others.

Add your contact information, even if you think the person already knows your phone number, and say it twice slowly so that the listener has additional time to get a pen and paper if they're still looking for them the first time you say it. Imagining you were writing down your phone number as you recite it will help you deliver it at a listener-friendly speed (*Business Communication for Success*, 2015, 15.2). Precise pronunciation is crucial because “60” and “16” or “90” and “19” may sound the same in a strong accent.

Be prepared to receive voicemail by recording a professional-sounding call-back message that begins after about 4-5 rings. Top professionals record a new one every morning when they begin work and include the date in it. They can thus state what their availability is throughout the day and assure the listener how quickly to expect a call back. When you receive a voicemail, return the call as soon as possible. The 24-hour rule of email doesn't apply with voicemail because the person who called you chose this channel deliberately expecting to discuss something with you “live” in a timely manner. With so many channels available (see Table 2.3 above), using the phone implies a sense of urgency.

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Key Takeaway



Success in the workplace depends on your ability to effectively engage coworkers, clients, managers, and other stakeholders in face-to-face conversation and on the phone.

Exercises



1. Reflect on your personal use of technology after reading §10.1.3 and watching the videos linked there. Would you consider your relationship with your smartphone an addiction? Do you feel that it erodes your people skills and ability to engage meaningfully with other people? Write a one-page response and defend your position with evidence.
2. How comfortable are you with speaking on the phone? Are you more likely to text someone than call them, even if calling would be quicker, you're both available, and there's no reason why either of you couldn't just talk? Reflect honestly on why you prefer to text rather than to talk (if that's the case). Next, exchange phone numbers with a classmate you haven't previously spoken with and have a conversation on the topic. Follow the advice about conversations given throughout §10.1.2 and §10.1.3, and about phone conversations in §10.1.4.

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10.2: PROFESSIONALISM, ETIQUETTE, AND ETHICAL BEHAVIOUR

Learning Objectives



1. Define professional behaviour according to employer, customer, coworker, and other stakeholder expectations.
2. Explain the importance of ethics as part of the persuasion process.
3. Define and provide examples of sexual harassment in the workplace, as well as strategies for how to eliminate it.
4. Identify and provide examples of eight common fallacies in persuasive speaking.
5. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.

From the moment we started considering what communication skills employers desire (see §1.1.2 above) onwards throughout this guide, we've been examining aspects of professional behaviour. A recurring theme has been the importance of being nice. The logic is that, if you're nice and the people you work with and for like you because they feel that they can trust you and are productive when you collaborate with them, you'll keep your job and be presented with attractive new opportunities. In this section we'll look closer at behaviours that will get you liked and open doors for you.

Professionalism, Etiquette, and Ethical Behaviour Topics

- 10.2.1: Professional Behaviour in the Workplace
- 10.2.2: Business Etiquette
- 10.2.3: Respectful Workplaces in the #MeToo Era
- 10.2.4: Speaking Ethically and Avoiding Fallacies

10.2.1: Professional Behaviour in the Workplace

We've said from the beginning that professional communication must always cater to the audience. This is true especially in face-to-face interactions where, unlike with written communication, you can assess audience reaction in real time and adjust your message accordingly. This places the responsibility of behaving professionally in the workplace solely on you. When we speak of professional behaviour, we mean the following aspects that generally fall under the banner of soft skills:

- Civility
- Social Intelligence
- Emotional Intelligence
- Social Graces

We'll consider these aspects in more detail throughout this subsection, but first we'll spend some time on the personality traits of successful professionals.

We must be careful with how we define success when we speak of personality, however. Those who lack the soft skills associated with the above aspects are difficult to work with and are usually demoted or fired. In rare instances, cruel, selfish, arrogant, narcissistic, or sociopathic people rise to positions of power through a combination of enablers tolerating or even rewarding their anti-social behaviour and their own lying, cheating, and bullying. This is an unfortunate reality that's difficult to watch, but it's important that the rest of us avoid being enablers. It's also important that we don't let their bad example lead us into thinking that such behaviour is right. It isn't, and the proof is the suffering it spreads among people in their sphere of influence. For every horrible person who moves up the corporate ladder, there'll be a trail of broken, bitter, and vengeful people in their wake. The loathing most people feel towards such people proves the importance of conducting ourselves otherwise.

10.2.1.1: The Five Qualities of a Successful Professional

A persistent idea within the field of psychology is that there are five basic personality traits, often known as the "Big Five" or by the acronyms OCEAN or CANOE. Each trait contains within it a sliding scale that describes how we behave in certain situations. The five are as follows:

- **Openness** to experience: curious and innovative vs. cautious and consistent
- **Conscientiousness**: goal-driven and detail-oriented vs. casual and careless
- **Extraversion**: outgoing and enthusiastic vs. solitary and guarded
- **Agreeableness**: cooperative and flexible vs. defiant and stubborn

- **Neuroticism:** anxious and volatile vs. confident and stable

Except for neuroticism, most of the traits as named correlate with professional success. Researchers have found that successful people are generally organized, innovative, outgoing, cooperative, and stable, although extraverts don't do as well as introverts on individual tasks and agreeableness doesn't necessarily lead to a high salary (Spurk & Abele, 2010; Neal et al., 2011).

Blending these with Guffey, Loewy, and Almonte's six dimensions of professional behaviour in *Essentials of Business Communication* (2016) and putting our own spin on these ideas, Table 10.2.1.1 below presents a guide for how generally to be successful in your job, how to be well liked, and how to be happy. Consider it also a checklist for how to be a decent human being.

Table 10.2.1.1: The Five Qualities of a Successful Professional

Quality	Specific Behaviours
Conscientious	<ul style="list-style-type: none"> • Consistently do your best work in the time you have to do it • Be organized and efficient in your workflow and time management • Be realistic about what you can accomplish and follow through on commitments • Go the extra mile for anyone expecting quality work from you (while respecting time, budget, or other constraints) • Finish your work on time rather than leave loose ends for others
Courteous	<ul style="list-style-type: none"> • Speak and write clearly at a language level your audience understands • Be punctual: arrive at the workplace on time and deliver work by the deadline • Notify those expecting you when you're running late • Apologize for your own errors and misunderstandings • Practice active listening • Share your expertise with others and be a positive, encouraging mentor to those entering the workplace
Tactful	<ul style="list-style-type: none"> • Exercise self-control with regard to conversational topics and jokes • Avoid contentious public and office politics, especially in writing • Control your biases by being vigilant in your diction (e.g., word choices involving gendered pronouns) • Accept constructive criticism gracefully • Provide helpful, improvement-focused feedback mixed with praise • Keep negative opinions of people to yourself • Be patient, understanding, and helpful towards struggling colleagues
Ethical	<ul style="list-style-type: none"> • Avoid even small white lies and truth-stretching logical fallacies • Avoid conflicts of interest or even the perception of them • Pay for products and services as soon as possible if not right away • Respect the confidentiality of private information and decisions • Focus on what you and your company do well rather than criticize competitors to customers and others • Follow proper grievance procedures rather than take vengeance • Be charitable whenever possible
Presentable	<ul style="list-style-type: none"> • Be positive and friendly, especially in introductions, as well as generous with your smile • Present yourself according to expectations in grooming and attire • Practice proper hygiene (showering, dental care, deodorant, etc.) • Follow general rules of dining etiquette

Source: Guffey, Loewy, & Almonte (2016, p. 309: Figure 10.1)

10.2.1.2: Civility

Civility simply means behaving respectfully towards everyone you interact with. Being civilized means following the golden rule: treat others as you expect to be treated yourself. The opposite of civility is being rude and aggressive, which creates conflict and negatively affects productivity in the workplace because it creates a so-called chilly climate or a toxic work environment. Such a workplace makes people uncomfortable, miserable, or angry—not emotions normally conducive to people doing their best work.

10.2.1.3: Social Intelligence

In the decades you’ve been immersed in the various cultures you’ve passed through, you’ve come to understand the (often unspoken) rules of decent social interaction. Having social intelligence means following those rules to cooperate and get along with others, especially in conversation. This includes reading nonverbal cues so that you know:

- How and when to initiate conversation
- When it’s your turn to speak and when to listen in order to keep a conversation going
- What to say and what *not* say
- How to say what you mean in a manner that will be understood by your audience
- When and how to use humour effectively and when not to
- How and when to end conversation gracefully

People who lack social intelligence, perhaps because they missed opportunities to develop conversational skills in their formative school years, come off as awkward in face-to-face conversation. They typically fail to interpret correctly nonverbal cues that say “Now it’s your turn to speak” or “Okay, I’m done with this conversation; let’s wrap it up.” It’s difficult to interact with such people either because they make you do all the work keeping the conversation going or don’t let you speak and keep going long after you wanted it to stop, forcing you to be slightly rude in ending it abruptly. Like any other type of intelligence, however, social intelligence can be developed through an understanding of the principles of good conversation (see §10.1 above) and practice.

10.2.1.5: Emotional Intelligence

Like social intelligence, emotional intelligence (EI) involves being a good reader of people in social contexts, being able to distinguish different emotions, and knowing what to do about them with regard to others and yourself. Strong EI means knowing how a person is likely to react to what you’re about to say and adjusting your message accordingly, and then adjusting again according to how they actually react. Though we often

hide our inner emotional state—smiling and looking happy when we’re feeling down, or wearing a neutral “poker face” to mask our excitement—in professional situations, EI enables us to get a sense of what others are actually feeling despite how they appear. It involves reading subtle nonverbal signals such as eye movements, facial expressions and fleeting micro-expressions (Ekman, 2017), posture, hands, and body movements for how they betray inner feelings different from the outward show. Beyond merely reading people, however, EI also requires knowing how to act, such as empathizing when someone is upset—even if they’re trying to hide it and show strength—because you recognize that you would be upset yourself if you were in their position (see §10.5.3.4 below for more on empathy).

Every interaction you have is coloured by emotion—both yours and the person or people you interact with. Though most routine interactions in the workplace are on the neutral-to-positive end of the emotional spectrum, some dip into the red—anywhere from slightly upset and a little sad to downright furious or suicidal. Whether you keep those emotions below the surface or let them erupt like a volcano depends on your self-control and the situation. Expressing such emotions in the workplace requires the good judgment represented by the **3 T’s**:

- **Tact:** Recognizing that what you say has a meaningful impact, tact involves the careful choice of words to achieve intended effects. In a sensitive situation where your audience is likely to be upset, for instance, tact requires that you use calming and positive words to reduce your message’s harmful impact (see §8.3 above on negative messages). When *you’re* upset, tact likewise involves self-restraint so that you don’t unleash the full fury of what you’re feeling if it would be inappropriate. When emotions are running high, it’s important to recognize that they are just thoughts that come and go, and that you may need some additional time to process information when you’re in a different emotional state before communicating about it.
- **Timing:** There’s a time and place for expressing your emotions. Expressing your anger when you’re at the height of your fury might be a bad move if it moves you to say things you’ll later regret. Waiting to cool down so that you can tactfully express your disappointment will get the best results if it’s an important matter. If it’s a trivial matter, however, waiting to realize that it’s not worth the effort can save you the trouble of dealing with the fallout of a strong and regrettable reaction.
- **Trust:** You must trust that the person you share your feelings with will respect your privacy and keep whatever you say confidential or at least not use it against you.

By considering these 3 T’s, you can better manage the expression of your own emotions and those of the people you work with and for in the workplace (*Business Communication for Success*, 2015, 14.6).

Like those who lack social intelligence, those who lack emotional intelligence can often be difficult to work with and offensive, often without meaning to be. When someone fails to understand the emotional “vibe” of their audience (fails to “read the room”), we say that they are “tone deaf.” This can be a sign of immaturity because it takes years to develop EI through extensive socialization in your school years and beyond, including

learning how and why people take offense to what you say. Someone who jokes openly about another's appearance in front of them and an audience, for instance, either fails to understand the hurt feelings of the person who is the butt of the joke or doesn't care. Either way, people like this are a liability in the workplace because their offense establishes an environment dominated by insecurity—where employees are afraid that they'll be picked on as if this were the elementary school playground. They won't do their best work in such a “chilly climate” or toxic environment.

10.2.1.6: Social Graces

Social graces include all the subtle behavioural niceties that make you likeable. They include manners such as being polite, etiquette (e.g., dining etiquette), and your style of dress and accessories. We will explore most of these in the following section, but for now we can list some of the behaviours associated with social graces:

- Saying *please* when asking someone to do something
- Saying *thank you* when given something you accept
- Saying *no, thank you, but thanks for the offer* when offered something you refuse
- Complimenting someone for a something they've done well
- Speaking positively about others and refraining from negative comments
- Smiling often
- Being a good listener

Of course, there is much more to social graces, but let's focus now on specific situations in which social graces are expressed.

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10.2.2: Business Etiquette

Etiquette is a code of behaviour that extends to many aspects of how we present ourselves in social situations. We've examined this throughout this guide in specific written applications (e.g., using a well-mannered, courteous style of writing, such as saying please when asking someone to do something; see §4.5.2.5). Though we'll examine specific applications of etiquette associated with various channels (e.g., telephone) throughout this chapter, we will here focus on dining etiquette and dress.

10.2.2.1: Dining Etiquette

If you are invited out for a lunch by a manager, it's probably not just a lunch. They will assess how refined you

are in your manners so that they know whether they can put you in front of clients doing the same and not embarrass the company. Though it may not be obvious, they'll observe whether you use your utensils correctly, chew with your mouth closed, wait till your mouth is empty before speaking or cover your mouth with your hand if you must speak while chewing, and how you position your cutlery when you're done. Why does any of this matter?

Though all of this seems like it has nothing to do with the quality of work, it shows the extent to which you developed fastidious habits and self-awareness. Someone who chews with their mouth open, for instance, either lacks the self-awareness to know that people tend to be disgusted by the sight of food being chewed, or doesn't care what people think. Either way, that lack of self-awareness can lead to behaviours that will ruin their reputation, as well as that of the company they represent. The University of Kansas presents a handy Dining Etiquette (School of Business, 2001) for starters.

10.2.2.2: Dressing Appropriately for the Workplace

When we hear the word *uniform*, we often think of a very specific style such as what a police officer or nurse wears. In a general sense, however, we all wear uniforms of various styles in whatever professional or institutional environment we participate in. Dressing appropriately in those situations and in the workplace specifically has everything to do with meeting expectations. In an office environment, clients, coworkers, and managers expect to see employees in either suits or a business-casual style of dress depending on the workplace. In such situations, conformity is the order of the day, and breaking the dress code can be a serious infraction.

Though some infractions are becoming less serious in many places because the general culture is becoming more accepting of tattoos, piercings, and dyed hair as more and more people use these to express themselves, you might need to be careful. Consider the following points:

- **Tattoos:** Though a significant proportion of the population has tattoos and therefore they are more acceptable across the board, overly conspicuous tattoos are still considered taboo. Tattoos on the face, neck, or hands, for instance, are considered risky because of their association with prison and gang branding. Tattoos that can be covered by a long-sleeved shirt with a collar and slacks are a safe bet. However, if you have tattoos on your forearms depicting scenes of explicit sex or violence, consider either getting them removed or never rolling up your sleeves if you want to get hired and keep your job.
- **Piercings:** Of course, earrings are *de rigueur* for women and acceptable on men as well. However, earlobe stretching and piercings on the nasal septum or lips are still generally frowned upon in professional settings. Any serious body modification along these lines is acceptable in certain subcultures, but not in most workplaces.
- **Dyed hair:** As with tattoos and piercings, hair dye is becoming more acceptable generally, but extreme expression is inadvisable in any traditional workplace. Where customer expectations are rigid (e.g., in a medical office), seeing someone with bright pink hair will give the impression of an amateur operation.

rather than a legitimate health care facility.

Because conformity is the determining factor of acceptability in proper attire in any particular workplace, the best guide for how to dress when you aren't given a specific uniform is what everyone else wears. Observe closely their style and build a wardrobe along those lines. If the fashion is slacks with a belt that matches the colour of your shoes and a long-sleeve, button-up, collared shirt for men and a full-length skirt and blouse for women, do the same (Feloni, Lee, & Cain, 2018).

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10.2.3: Respectful Workplaces in the #MeToo Era

Most of what we've been saying in this chapter and throughout this guide focuses on how we *should* behave to be effective, respected professionals in our respective workplaces. Unfortunately, this isn't what we always see in actual workplaces. Misbehaviour is rampant and is especially harmful when it's harassment of a sexual nature. The broader culture took a hopeful step forward toward more respectful workplaces in 2017-2018 with the rise of the #MeToo and Time's Up movements.

Though initially a response to high-profile sexual assault cases in the entertainment industry where perpetrators often went unpunished for decades, #MeToo activists successfully brought the movement to the broader culture via social media. After the outrage of the former CBC Radio host Jian Ghomeshi's acquittal for sexual assault charges (Gollom, 2016), Canada was ripe for a cultural shift against its own issues with rape culture generally and toleration of sexual harassment in the workplace. Encouraged by a series of public accusations, firings, and resignations of prominent men in the entertainment, media, and political arenas throughout North America, women everywhere were encouraged to challenge widespread toleration of common sexual harassment and assault by reporting incidents to their employers and speaking out to shame everyday offenders in social media. For those who were unaware, it revealed the troubling extent of sexual harassment even in supposedly "nice" Canadian workplaces.

10.2.3.1: The Prevalence of Sexual Harassment in the Workplace



According to *Doing Our Duty: Preventing Sexual Harassment in the Workplace* by the Human Resources Professionals Association (HRPA, 2018a), “sexual harassment in the workplace is an epidemic that has been allowed to persist” for too long (p. 5). In a survey of nearly a thousand HRP members in Ontario, 43% of women said they’ve been sexually harassed in the workplace, and about four-fifths said they didn’t report it to their employers (p. 12). In a separate online survey of 2000 Canadians nationwide, 34% of women reported experiencing sexual harassment in the workplace and 12% of men, and nearly 40% of those say it involved someone who had a direct influence over their career success (Navigator, 2018, p. 5). These perceptions are completely out of step with what top executives believe, with 95% of 153 surveyed Canadian CEOs and CFOs confirming that sexual harassment is not a problem in their workplaces (Gandalf Group, 2017, p. 9). Clearly there are differences of opinion between those who experience sexual harassment on the floor and those in the executive suites who are responsible for the safety of their employees, and much of the confusion may have to do with how sexual harassment is defined.

10.2.3.2: What Is Sexual Harassment?



The *Canada Labour Code*'s definition of sexual harassment

is quite broad, but oriented more toward the perception of the person offended than the intentions of the offender. Though there is nothing wrong with discrete flirtation between two consenting adults on break at work, a line is crossed as soon as one of them—or third-party observers—feels uncomfortable with actions or talk of sexual nature. According to Provision 241.1 of the *Code*,

sexual harassment means any conduct, comment, gesture or contact of a sexual nature that is likely to cause offence or humiliation to any employee, or that might, on reasonable grounds, be perceived by that employee as placing a condition of a sexual nature on employment or on any opportunity for training or promotion. (Government of Canada, 1985, p. 214)

The *Code* clarifies that all employees have a right to conduct their work without being harassed (241.2), but what does that look like in practice?

For help with understanding what specific behaviours constitute sexual harassment, the City of Toronto's Human Rights Office's 2017 "Sexual Harassment in the Workplace" guide lists the following 21 examples of offenses that have had their day in court:

- Making unnecessary physical contact, including unwanted touching (e.g., stroking hair, demanding hugs, or rubbing a person's back)
- Invading personal space
- Using language that puts someone down because of their sex, sexual orientation, gender identity, or gender expression
- Using sex-specific derogatory names, homophobic or transphobic epithets, slurs, or jokes
- Leering or inappropriate staring
- Gender related comments about a person's physical characteristics or mannerisms, comments that police or reinforce traditional heterosexual gender norms
- Targeting someone for not following sex-role stereotypes (e.g., comments made to a female for being in a

position of authority)

- Showing or sending pornography, sexual images, etc. (e.g., pinning up an image of a naked man in the bathroom)
- Making sexual jokes, including forwarding sexual jokes by email
- Rough or vulgar language related to gender (e.g., “locker-room talk”)
- Spreading sexual rumours, “outing” or threatening to out someone who is LGBTQ2S (e.g., sending an email to colleagues about an affair between a supervisor and another employee)
- Making suggestive or offensive comments about members of a specific gender
- Sexually propositioning a person
- Bragging about sexual prowess
- Asking questions about sexual preferences, fantasies, or activities
- Demanding dates or sexual favours
- Verbally abusing, threatening, or taunting someone based on gender
- Threatening to penalize or punish a person who refuses to comply with sexual advances
- Intrusive comments, questions or insults about a person’s body, physical characteristics, gender-related medical procedures, clothing, mannerisms, or other forms of gender expression
- Refusing to refer to a person by their self-identified name or proper personal pronoun, or requiring a person to prove their gender
- Circulating or posting of homophobic, transphobic, derogatory or offensive signs, caricatures, graffiti, pictures, or other materials

The guide explains that any such behaviours involving professional colleagues in the physical or online workspace, as well as offsite outside of normal hours (e.g., work parties or community events), should be reported without fear of reprisal (City of Toronto, 2017, pp. 2-3).

10.2.3.3: How to Make the Workplace More Respectful

Though the *Canada Labour Code* places the responsibility of ensuring a harassment-free workplace squarely on the employer (Provision 247.3), all employees must do their part to uphold one another’s right to work free of harassment. At the very least, everyone should avoid any of the 21 specific examples of sexual harassment listed above, even in the context of lighthearted banter. Employees everywhere should be held to a higher standard, however, which the HRPAs advocates in the following recommendations:

- All companies must have a stand-alone sexual harassment and assault policy, as required by the *Labour Code*.
- All employees must familiarize themselves with their company’s sexual harassment policy, which should include guidance on how to report instances of harassment.

- All companies must conduct training sessions on their sexual harassment policy, including instruction on what to do when harassed or witnessing harassment, and all employees must participate.

Of course, experiencing harassment places the victim in a difficult position with regard to their job security, as does witnessing it and the duty to report. The situation is even more complicated if the perpetrator has the power to promote, demote, or terminate the victim's or witness's employment. If you find yourself in such a situation, seeking the confidential advice of an ombudsperson or person in a similar counselling role should be your first recourse. Absent these internal protections, consider seeking legal counsel.

If you witness sexual or other types of harassment, what should you do? The following guide may help:

1. If it's safe for you to do so, try recording video the incident on your smartphone. The mere presence of the phone may act as a deterrent to further harassment. If not, however, a record of the incident will be valuable in the post-incident pursuit of justice.
2. If you can play any additional role in stopping the harassment before it continues, try to get the attention of the person being harassed and ask them if they want support and what exactly you can do.
3. If it's welcome from the victim and safe for both you and them, try to place yourself between them and the attacker. If the victim is handling the attack in their own way, respect their choice.
4. If the harassment continues, try to de-escalate the situation non-violently by explaining to the offender that the one being harassed has a right to work in peace. Only resort to violence if it's defensive.
5. After a safe resolution, follow up with the person being harassed about what you can do for them (American Friends Service Committee, 2016).

Of course, every harassment situation is different and requires quick-thinking action that maintains the safety of all involved. The important thing, however, is to be act as an ally to the person being harassed. The biggest takeaway from the development of the #MeToo and Time's Up movements is that a workplace culture that permits sexual harassment will only end if we all do our part to ensure that offenses no longer go unreported and unpunished.

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10.2.4: Speaking Ethically and Avoiding Fallacies

When we discussed persuasive messages earlier (see §8.4), we focused on best practices without veering much into what's considered offside in the art of persuasion. When we consider ethical behaviour in the workplace, it's worth revisiting the topic of persuasion so that we can address how not to persuade. In other words, how can we avoid manipulating someone in professional situations so that they don't later feel like they were taken advantage of.

In the context of communication, manipulation is the management of facts, ideas or points of view to play

upon people's insecurities or to use emotional appeals to one's own advantage. Though emotional appeals were part of the rhetorical triangle discussed earlier in §8.4.1, they cross the line into manipulation when motivated by an attempt to do something against the best interests of the audience, which expects that you treat them with respect. Deliberately manipulating them by inciting fear or guilt is unethical. Likewise, deception is unethical because it uses lies, partial truths, or the omission of relevant information to deceive. No one likes to be lied to or led to believe something that isn't true. Deception can involve intentional bias or the selection of information to support your position while negatively framing any information that might challenge your audience's belief.

Other unethical behaviours with respect to an audience such as a workplace team include coercion and bribery. **Coercion** is the use of power to make someone do something they would not choose to do freely. It usually involves threats of punishment, which get results at least while the “stick” is present, but results in hatred towards the coercing person or group and hence a toxic work environment. **Bribery**, which is offering something in return for an expected favour, is similarly unethical because it sidesteps normal, fair protocol for personal gain at the audience's expense. When the rest of the team finds out that they lost out on opportunities because someone received favours for favours, an atmosphere of mistrust and animosity—hallmarks of a toxic work environment—hangs over the workplace.

10.2.4.1: Eleven Unethical Persuasive Techniques

Though you may be tempted to do anything to achieve the result of convincing someone to act in a way that benefits you and your company or organization, certain techniques are inherently unethical. The danger in using them is that they will be seen for what they are—dishonest manipulation—and you'll lose all credibility rather than achieve your goal. Just as we have a set of DOs for how to convince someone effectively in a decent way, we also have a set of DON'Ts for what not to do.

In *Ethics in Human Communication*, Richard Johannesen (1996) offers eleven points to consider when speaking persuasively. **Do not:**

- Use false, fabricated, misrepresented, distorted or irrelevant evidence to support arguments or claims
- Intentionally use unsupported, misleading, or illogical reasoning
- Represent yourself as an “expert” (or even informed) on a subject when you're not, as in the case of “**mansplaining**” (McClintock, 2016)
- Use irrelevant appeals to divert attention from the issue at hand
- Ask your audience to link your idea or proposal to emotion-driven values, motives, or goals to which it is unrelated
- Deceive your audience by concealing your real purpose, your self-interest, the group you represent, or your position as an advocate of a viewpoint
- Distort, hide, or misrepresent the number, scope, intensity, or undesirable features of consequences or

effects

- Use “emotional appeals” that lack a supporting basis of evidence or reasoning
- Oversimplify complex, multi-layered, nuanced situations into simplistic, two-valued, either/or, polar views or choices
- Pretend certainty where tentativeness and degrees of probability would be more accurate
- Advocate for something that you yourself do not believe in

If you tried any of the above tricks and were found out by a critical-thinking audience, you risk irreparable damage to your reputation personally and that of your company.

Though you might think that the above guidelines wipe out most of a marketer’s available techniques, in fact they leave plenty of room for creative argument following the model for persuasive argument outlined in §8.4 above. After all, the goal of any such argument in a professional situation is to achieve a mutually beneficial result, one where both you and your audience benefit by getting something you both want or need in a free and honest exchange. Your audience will appreciate your fair dealing as you build your credibility (or *ethos* in the rhetorical triangle terminology introduced in §8.4.1).

10.2.4.2: Avoiding Fallacies

Logicians (experts on logic) have long pointed out a set of rhetorical tricks, called fallacies, that charlatans use to convince others of an argument that has no merit on its own. Though these fallacies are typically deceptive in nature, they still manage to convince many people in ways that undermine their own interests. Whenever you see anyone resorting to these tricks, you should probably be suspicious of what they’re selling or getting you to support. To be ethical in the way you present arguments in professional situations and steer clear of being held under suspicion by a critical audience yourself, avoid the eight fallacies explored below in Table 10.2.4.2.

Table 10.2.4.2: Logical Fallacies to Avoid

Fallacy	Definition	Example
1. Red Herring	Any diversion intended to distract attention from the main issue, particularly by relating the issue to a common fear	So-called “safe” injection sites in our neighbourhood will mean that more dealers will set up shop, too, leading to more crime.
2. Straw Man	A weak argument set up to be easily refuted, distracting attention from stronger arguments	Safe injection sites will increase illegal drug use because it’ll make those drugs easier to access, defeating the purpose of “harm reduction.”
3. Begging the Question	Claiming the truth of the very matter in question, as if it were already an obvious conclusion	Safe injection sites won’t save anybody because addicts will continue to overdose with or without them.
4. Circular Argument	A proposition is used to prove itself, assuming the very thing it aims to prove (related to begging the question)	Once a junkie, always a junkie. No “harm reduction” approach will solve the opioid crisis.
5. Bandwagon (a.k.a. Ad Populum)	Appeals to a common belief of some people, often prejudicial, and states everyone holds this belief	No one wants a safe injection site in their neighbourhood because they don’t care that much about the welfare of junkie criminals.
6. Ad Hominem	Stating that someone’s argument is wrong solely because of something about them rather than about the argument itself	The safe injection site advocate is a junkie himself. How can we trust him on issues of safety when every junkie lies as a matter of habit?
7. Non Sequitur	The conclusion does not follow from the premises	Since this whole obsession with being politically correct began 30 years ago, people now think that even addicts are worthy of respect.
8. Post Hoc Ergo Propter Hoc	Establish a cause-and-effect relationship where only a correlation exists	The rise of liberal attitudes since the 1960s has led to higher rates of incarceration across the country.

(*Business Communication for Success*, 2015, 14.6)

Avoiding such false logic helps strengthen your own argument by compelling you to stay within the bounds of sound argumentative strategies such as those covered above in §8.4.

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Key Takeaway



The quality of any workplace culture depends on the ethical conduct of its leadership and employees, with everyone treating one another with respect and speaking responsibly.

Exercises



1. First, think of someone who exemplifies everything you aspire to be in terms of their good behaviour in the workplace (loosely defined as anywhere someone does work—not necessarily where it's compensated with money). List the qualities and actions that make them such a good, well-liked model for behaviour. Second, think of someone who exemplifies everything you aspire to avoid in terms of their misconduct in the workplace. List the qualities and typical misbehaviour that make them so detestable.
2. Deliver a short presentation on dining etiquette or how to dress for success in the workplace with clear recommendations for how your audience should conduct themselves (follow Ch. 12 on presentations beforehand).
3. Have you ever experienced or witnessed sexual harassment in a workplace or institution (e.g., at school) according to the definition and examples given in §10.2.3.2? What happened and what did you do about it? Would you do anything differently in hindsight?
4. Find an example of advertising that is unethical because it relies on logical fallacies and other deceptive techniques explored in §10.2.4. Identify the fallacies or techniques and speculate on why the advertiser used them. Outline a more honest—yet still effective—advertisement for the same product or service.

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10.3: JOB INTERVIEWS AND FOLLOW-UP MESSAGES

Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
9. Identify successful strategies for job interview preparation.
10. Explain how best to answer standard and behavioural job interview questions.

In Ch. 9 above, we discussed how the job application process is basically a communications test that begins with a low-difficulty written component in the cover letter and résumé, and ends with a high-level oral exam in the interview. Among other things, the interview helps the employer get to know the job applicant better and confirm that they are who their résumé and cover letter say they are. It places the burden of proving the résumé's claims on the applicant by inviting them to speak anecdotally about them. The most successful applicants will use the interview questions as opportunities to connect their experience and qualifications to the requirements of the job at hand as stated in the job posting. The successful pitch convinces the employer that the applicant, as the solution to the problems associated with the job vacancy, is not only a good match for the role and its duties, but also a good fit for the culture of the workplace. The employer wants to confirm that the candidate will get along well with management, coworkers, and customers, which the employer can get a sense of only through conversation.

Advice about how to succeed in job interviews is about as varied as there are people offering advice on job interviews because every employer is different in how they conduct interviews and what they want to get out of them. This variety makes preparing for job interviews tricky. A job interview can be as informal as walking in to speak with a store manager without so much as a résumé. It could be as formal as a three-stage process with a pre-interview phone screening, two-hour interview in front of a panel asking the same questions of each candidate, and a follow-up hour-long interview with questions specific to the leading candidates. A rigorous interview process may have pre-interview screening procedures such as personality tests, written and

oral language proficiency tests, background investigations (e.g., college transcript, criminal records check), consultations with previous employers, and even personality-assessing video games (NPR, 2013) to ensure that the employer doesn't waste hours interviewing candidates unfit for the role. The interview may involve demonstrations of skill such as solving a complex engineering problem on a whiteboard. It may be conducted via web conference. It may be an unstructured conversation about something completely different from the work at hand and take place in a coffee shop. It may be in an off-site hotel room or in the actual workplace itself. The only consistent element in all of this variety is that you'll have a conversation with employer or their representatives.

Given the variety of types of interview, how can you possibly prepare for one? Let's consider this question with regard to what's common in most interviews and the employer's motivations in finding the perfect candidate for the role. Of course, you can't necessarily count on the employer being an excellent judge of character in an interview because, looking around the professional landscape, you can see various degrees of incompetence and repulsive personalities among employees; they all presumably managed to beat out other candidates in convincing employers to hire them in interviews. If you're unsure how it's going to play out, though, the best you can do is assume that your interview will be rigorous and prepare to "wow" them with your knowledge of the company, position, and yourself. Let's consider what you can do before, during, and after the interview to increase your chances of landing a job offer.

Job Interview Topics

- 10.3.1: Pre-Interview Preparation
- 10.3.2: Job Interview Performance
- 10.3.3: Post-interview Follow-up Messages

10.3.1: Pre-interview Preparation

When you get a call or email for an interview, congratulations! The employer is officially interested in you because you meet the basic qualifications of what they're looking for, but so do several other people—your competition—so don't celebrate quite yet. So now what? How do you do it better than them and rise to the top of the pile?

Between the moment you find out about the interview and the interview itself, you must do everything in your power to build the confidence necessary to answer questions convincingly so that the employer has no reason not to hire you. Confidence starts with knowing your stuff, so the first order of business is to review and build upon whatever research into both the company and the position you did for the written portion of your application. Whereas that research supplied the information you needed to select the experience and qualifications you assembled in your targeted résumé and cover letter, the research you now do will have to be

extensive enough that you can draw upon a sound understanding of the company and the role to be able to answer any reasonable question about them off the top of your head.

10.3.1.1: Research the Company Further

Of the questions you can anticipate in the interview, you can definitely prepare for those about the company itself. They might be as simple and blunt as “Tell us what you know about our company” or as strategic as asking you how you would best serve the company clientele in a certain situation. Since the first rule of business is to know the customer and what they want, the employer will want to ensure that your priorities are in line with its own, which is to supply the customer’s demand. If you have no idea who the customer is and what they want because all you did to prepare was skim the company website, the employer might just end the interview right there. You must therefore research as much as possible who the company serves and go beyond the company website. Does the company’s revenue come from other companies (is it a business-to-business supplier or contractor?), the government, or the consumer public? If the latter, get some solid information on their demographics. Are they primarily:

- Men, women, or both?
- What age? Children, adolescents, young adults, 20-35 year-olds, middle-aged adults, the elderly, or all ages?
- What are their life circumstances? Are they wealthy, middle class, or of limited means? Are they young parents or pensioners? Etc.
- What are their motivations? Are they filling a *want* or a *need*? What feeling are they trying to achieve with the product or service the company provides?

Once you have a good idea who the customer is, you can imagine some scenarios of customer interactions, especially to prepare for the interview’s behavioural questions (see §10.3.2.4 below).

You can find an excellent summary of the company’s priorities in its **mission or vision statement** if it has one. Many companies will have such a statement on their website, usually in the “About” page. Though these are usually very polished with marketing language, memorizing and being able to paraphrase them in a way that makes it your own will suggest to the employer that your goals in getting this job align with theirs, and that you will therefore be a good fit.

Of course, some standard information on the company is also necessary. Start by asking yourself:

- How big is it? Is it a single-location small business, a franchise stretching across a certain region of the province or nation, a governmental agency, or a multinational corporation?
- When was it founded and how has it changed over the years (e.g., has it changed ownership, changed its focus, diversified its product line, merged with other companies, etc.)?

- What are its current challenges?

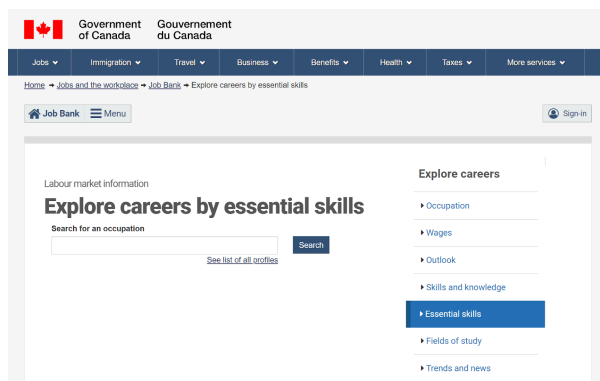
For this latter point, start by Google-searching for news items or ads in local or national news outlets. If you find that the company is embarking on some major newsworthy initiative or contract, chances are the position has to do with it. Whenever an employer prepares to spend money by hiring someone to do a job, it's to solve a problem, which in general is not having someone to do a certain set of tasks that would help achieve their business goals. Find out what that problem is in great detail so that you can convincingly pitch yourself—i.e., your skill sets and talents—as its solution.

Another way to do this is to get some inside information by asking around. If there's someone within the company whom you already know or can approach via networking to get some valuable “intel” (intelligence or information) on what the company culture is like and what the employer would therefore be looking for, then you could cater your answers to that profile. This isn't so much disingenuous as it is catering to the audience, which, as we've been saying since §2.2, is the essence of all good communication.

10.3.1.2: Research the Position Further

The previous subsection's advice about finding someone inside intel on the company culture pertains also to the position. If someone in the department where the position has opened up knows something about why that is, you'll want to take them out for coffee and a chat. The more you can discover about the motivations of the employer in hiring for that position, the better you can cater to those needs.

Absent insider help (or in addition to it), your next recourse is simply to study the job posting very closely and annotate it. For every point it describes in terms of required qualifications and skills, as well as a description of the job duties the successful candidate will perform, write notes about how your own work or educational experience prepared you to do the same. Otherwise, write notes about what you can say if your experience hasn't prepared you to perform those duties. Write your responses to each in terms that you would actually say to the employer if they asked you for evidence proving that you have the qualifications, skill, or ability to do the duties listed.



If the job posting is vague, you could instead research the role itself, the skills required to perform it successfully, and what duties it involves. A good place to start is the

Government of Canada's Job Bank Explore Careers by Essential Skills database. Every profession has a page that lists the following:

- The types of documents you would be reading, writing, and working with (literacy)
- Math skills (numeracy) involved
- Oral communication skills (oracy)
- Problem-solving skills
- Technology you would be working with—both hardware and software
- Additional Information

Closely studying every word of this would furnish you with a thorough idea of what the job entails and thus with material you can use in the interview to answer questions knowledgeably.

10.3.1.3: Anticipate Questions and Prepare Talking Points

Now that you've started a set of notes based on the job posting, continue building on it in a question-and-answer format. Come up with as many questions as you can think of that the employer could ask. The more job interviews you do, the more you can add and adapt questions for particular job types. We will explore some standard questions in §10.3.2.3 below and behavioural questions (§10.3.2.4) you can adapt to the profession at hand. Taking the time to work out your responses to these possible questions will help enormously if you refine and study those responses. If you do this well and the employer asks the very questions you anticipated, then your answers will roll off your tongue with confidence. You will look magnitudes better than the candidates who didn't prepare and have to stall to think about their responses before speaking. Those who don't prepare tend to poorly articulate their thoughts as they figure out their wording as they go, and then regret their answers afterward, realizing that they could have said it better or included a clinching detail that didn't come to mind at the time. When you work out those details ahead of time, however, answering perfectly off the top of your head will make you look like an in-demand expert.

As part of this preparation, write and memorize an **elevator pitch** with **four-to-five key talking points** that would best convince the employer that you're perfect for the position. Vague, open-ended questions such as "Why should we hire you?" or "What will make you successful in this position?" are your cue to hit those key points starting with your best selling point and working on down. Focus on your qualifications, experience, and the skills that best match with what the employer is looking for as stated in the job posting. Phrase them as brief, easy-to-follow stories. If you can summarize these coherently altogether in a minute or two—the time that it would take to accompany the employer up an elevator—and they genuinely recommend you well to the position, you do the employer the favour of giving them all they need to make a confident decision about your suitability.

If you don't get the opportunity to hit those key points served on a silver platter in one question, your job

is to look for opportunities to make those pitches throughout the interview. If you're genuinely well suited to the position, your chances are good that questions will lend themselves to at least some of those points. They may even ask at the end of the interview if you have anything else to say, in which case you can cover any of the points you hadn't so far found an opportunity to mention, as well as reiterate your main selling point or two in order to keep them fresh in interviewers' minds when you leave.

10.3.1.4: Rehearse with Mock Job Interviews

Of course, preparing a set of notes is useless if you lack the time to study and rehearse your responses in a mock job interview situation, so manage your time effectively and schedule mock job interviews throughout the week prior to your actual interview. The more comfortable and familiar you are with the interview dynamic of someone asking you questions and you responding, the more confident and articulate you can be for the real thing. Enlist a trusted partner, family member, friend, or even an interview coach from Algonquin College's Employment Support Centre to ask questions you anticipated, as well as some you haven't so you can practice thinking on your feet.

Help from a friend or acquaintance who is an employer themselves would be especially helpful because they can draw on personal experience to advise you on what works and what doesn't from their managerial perspective. Their honest feedback will be invaluable as long as you accept and implement their constructive criticism. You may also get a sense yourself of what works and what doesn't, but having someone else to talk to about it and work it out will do wonders for your interview preparedness.

10.3.1.5: Plan Your Attire

With dress being a form of nonverbal communication, be as strategic in planning what you're going to wear to your interview as you are with what you're going to say. When people make up their mind about you within milliseconds of looking at you, wearing a well-fitted suit or office-appropriate attire is crucial because, as with any communication, you must adapt your style to the expectations of your audience. Though you may think that a nice suit is essential in any job interview, there are types of jobs, such as in the trades, where wearing a suit might suggest that you won't really fit the workplace culture. If you're applying for a finance-industry job on the thirty-third floor of a Bay Street Toronto skyscraper, on the other hand, a shabby, ill-fitting suit will immediately suggest failure and the interview will be seen as a waste of valuable time.

For a good sense of how people in a workplace dress on a daily basis, go check it out for yourself. If the style of dress is casual, what would be considered unprofessional in any other place (e.g., in a tattoo shop), or if it's a uniform, dressing slightly more formally than that is probably a good bet. Of course, if there's any way to find out what the employer's actual expectation is, such as calling someone in the Human Resources department, go with whatever they say.

Whatever you wear, don't forget to wash, iron, and even have it dry-cleaned if necessary. Polish your shoes. Plan out and coordinate accessories. Try everything on ahead of time and solicit the advice of your partner, family, roommates, or friends. Apply the same scrutiny to the rest of your controllable appearance including your hair and skin (e.g., shaving) so that you leave no details unattended on interview day. One off-detail might be the one that the employer gets hung-up on and remembers about you, whereas you want everything about you to be as impeccable as the résumé and cover letter that got you this interview in the first place. A consistently high-quality presentation will suggest to the hiring manager that you'll be that way in the position they're hiring for.

10.3.1.6: Build Your Confidence

Many people consider job interviews among the most nerve-wracking situations in their life. Given that your livelihood and self-esteem depend on successfully passing the interview, such a high-pressure situation is sure to produce some (if not a great deal of) anxiety. Though this is a normal, healthy reaction, you simply cannot resign yourself to *acting* nervous in the interview itself because doing so threatens to spoil your chances of success. Just as confidence is contagious by the process of social mirroring (see §10.1.3.1 above), so is nervousness; if you appear nervous, the hiring manager will be nervous about hiring you because your behaviour suggests that you feel you're not equal to the task, that you're an impostor punching above your weight for even applying. If you answer questions confidently, on the hand, and build trust by looking the employer in the eye as you explain yourself, they'll be confident that you'll perform just as well in the job itself. What can you do, then, to help build the level of confidence that you need to succeed in the interview?

The social psychologist Amy Cuddy explains one particularly promising strategy nicknamed “**fake it to make it**” in a well-viewed TEDtalk. Cuddy bases her advice on credible research into the effect whereby you can achieve certain emotional states by the actions of your body. Just as an athlete strikes a victory pose when they win and feel powerful, you can trick yourself into feeling confident by striking power poses before your performance. Either way, the confidence hormone testosterone increases as the stress hormone cortisol drops. Though it may feel silly, locking yourself in a bathroom stall and striking some powerful Superman or Wonder Woman poses has been clinically proven to help interview performance and positively determine employer choices. A short workout has the same effect, though you don't want physical exertion just prior to your interview to make you appear sweaty lest that be confused with nervousness.

https://www.youtube.com/watch?v=Ks_Mh1QhMc[/embed]

Besides this simple, no-cost “life hack,” your only other best bet for increasing confidence is to know your stuff inside and out. When you've rehearsed your interview repeatedly and get to the point where you can answer anticipated questions confidently and eloquently, as well as control for every other detail regarding your appearance, you should feel on top of it. With this confidence, you should feel ready to nail the interview and land the job.

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10.3.2: Job Interview Performance

Once you've done all you can to prepare, you're now ready to take the interview by storm. Your goal here is to thoroughly impress the employer so they have no doubt whatsoever that you'll be a sound investment. Just as you refuse to buy a product that is even slightly defective (e.g., you wouldn't buy a computer with a key missing or a slightly cracked screen), the employer will be careful with the money they'll pay the winning candidate to do the job. They want perfection, but if they can't find it, they may either accept something slightly less or just re-post the position to keep searching for someone closer to what they're looking for. Knowing that your livelihood's at stake and that employers don't hand out jobs quite as easily at the professional level as they did your first entry-level job at Tim Hortons or Subway, you have to make your interview performance impeccable. You've only got one shot at it, so you want to take care of every last detail. Yes, it's possible to win a job competition if your performance falls short of the advice given in the subsections below, but you should at least aim for the perfection described below if you want to increase your chances of success.

10.3.2.1: Arrive Early

Don't leave something so important to chance. Aim to arrive an hour or so before the interview is scheduled in case there's a traffic jam or other unexpected snag on the way. If it's a smooth ride and you arrive early, use your time wisely. Go to the washroom and, while you're in there, try out some of Amy Cuddy's power poses to help build your confidence (see §10.3.1.6 above). If you're then seated in a waiting room, ensure that you have good posture. Keep calm by breathing deeply; count to five slowly while inhaling and the same while exhaling. Get in the zone by focusing on the points you prepared to talk about, rehearsing them in your head. Be self-aware of your nonverbals. If the employer entered the room right then and looked directly at you, would they see someone who looks nervous, intense, bored, frustrated, zoned-out, or excited? Only the latter will make the strong first impression that will set you on the path to success.

10.3.2.2: Make a Strong First Impression

As the ad slogan cliché goes, you never get a second chance to make a first impression. Recent studies show that in fact we make up our minds about people in about a tenth of a second and tend to focus on details that confirm that first impression thereafter (Willis & Todorov, 2006). This means that some of your success comes down to what you look like the moment you walk into the room or the hiring manager enters the waiting room to call you in. Though there's not much you can do about the shape of your face, you have plenty of control over the grooming of your hair, skin, and of course your style of dress as discussed in §10.3.1.5 above. What makes the most difference, however, is if your smile conveys a sense of enthusiasm for what's about to go down.

After first sight, the first-impression saga continues with your nonverbal behaviour as you get up and

approach the employer, giving you crucial seconds to confirm their already-positive impression or sway them toward a more favourable one. Smiling is key as it conveys warmth and friendliness, which is what most employers will want you to be around coworkers and customers for operations to go well. Next, greet them with a friendly “Pleased to meet you” (or the like) and shake their hand firmly but not aggressively. A limp handshake will give the impression of being a pushover without any confidence. A crushing, vise-like grip, on the other hand, will say that you’re foolishly trying to dominate someone who is in fact secure in the dominant position, or that you’re over-compensating for feelings of inadequacy. If the interview is before a panel with several other interviewers or assessors, say your greetings and shake their hands as well. Introductions will probably go around the panel, in which case take care to remember their names because they will be really impressed by your people skills if you can repeat their names when parting at the end.

The moments when you are led to your place at the table or desk for the interview itself are also crucial for the manners you display. They’ll assess for how you might behave around coworkers and clients, so if you engage in pleasant small-talk in a way that shows off your social agility, and even wit if you can say something genuinely funny in there, you’ll be on a good footing going into the interview proper. If you come off as awkward by botching your timing and speaking at the same time as the interviewer or responding weirdly, you set yourself at a disadvantage that will be difficult to recover from. The same will happen if you appear overly shy with one- or two-word answers to the employer’s attempts at small talk. On your way to the interview, you may wish to prepare some witty things to say about your trip over or the weather when the need for small-talk arises, but be able to deliver them naturally at the expected moment.

Finally, wait for the employer’s cue to sit down at whatever chair they designate. As you thank them for the seat, you may also set an appropriately polite tone by thanking them for the opportunity to speak about the position. Express gratitude that they’re generously giving you their valuable time despite their busy schedules.

10.3.2.3: How to Answer Standard Questions

You never know exactly what an employer is going to ask you during the interview because they rightly going to rely on the element of surprise to test how well you can think on your feet. Luckily, however, there are several questions you might expect to hear variations of because most employers have the same or similar motivations, and therefore tend to ask a similar set of questions. Preparing responses to these questions ahead of time, as advised in §10.3.1.3 above, will help you articulate your answers smoothly during the actual interview. While still anticipating having to adjust your answers to whatever spin the employer puts on these standard questions, you can avoid the awkwardness of having to entirely work out your responses as you go.

Before we look at these, let’s consider for a moment what depth you should go into with each response. Before employers begin asking questions, they often explain the structure of the interview and possibly provide you with a printed list of questions or, if not, say how many questions and how much time you have for the whole interview. With these two pieces of information, do some quick math to determine approximately how much time you have to answer each question. If you have an hour for 15 questions, for instance, you can ball-

park around about 3-4 minutes per response when you factor in the time it takes for them to ask each one. Knowing this, a 30-second answer to any of the questions will disappoint the interviewer with nowhere near the level of detail they expect. On the other hand, rambling on for five or more minutes will hurt you unless you're responding to the most important question, the one that allows you to make your main pitch. Just remember that you'll need to steal some time from less important questions later.

How do you stretch out an answer to 3-4 minutes if that's how much time you have? **Provide specific evidence.** Even if you don't have that much time, the more specific your responses are in terms of the evidence they provide the employer, the more truthful they sound. Back up everything you say with anecdotal evidence informing how you came to that conclusion. Try to link your answers to your evidence with the word *because*. If the employer asks how you would deal with a certain problem related to the profession—how you would deal with a workplace accident that seriously injures a co-worker, for instance—first say what you would do. Next, follow it up with “because that’s how we trained to deal with a severe trauma injury in my 20-hour Workplace Safety course at Algonquin College” or “because that’s what the Occupational Health and Safety Act requires us to do.” Show that you benefited from your training and do your job by the book when required.

Let's now consider some typical questions, what motivates the employer to ask them, what they hope to hear, what responses will effectively ruin you, and what responses will tilt you favourably toward winning a job offer.

10.3.2.3.1: “Tell us about yourself.”

- “Why should we hire you?”
- “Why do you think you’ll be successful in this position?”
- “Have you done this type of work before?”
- “What experience has prepared you for this position?”
- “How have non-employment experiences prepared you for this job?”

Open-ended questions tend to have the effect of catching those who aren't expecting them off guard; the unprepared interviewee might be temporarily paralyzed as they figure out where to start. When asking such a vague question, however, the employer really wants to see where you go with it. They prefer to see you describe yourself as a professional who will solve whatever problem they're hiring someone to address. A slightly disappointing answer will immediately digress into irrelevant personal details, such as where you were born and how old you are (details you should avoid divulging for the bias they may invite), before coming around to your professionalism. A profoundly disappointing answer will carry on into hobbies and personal interests without even getting around to your professionalism.

On the other hand, if you begin by saying that you're an accountant (if the job is to be an accountant) who has 10 years' experience doing the very job that the employer is hiring for, you'll immediately give the hiring

manager confidence in your sense of professionalism. If you continue from there to list your skills that match up with what the job posting described as required, explaining what combination of education and work experience taught you those skills and helped develop them into competencies, the employer might be tempted to offer you the job right then and there.

10.3.2.3.2: “Why would you like to work here?”

- “Why did you choose this profession?”
- “What do you like so much about a [job title]?”
- “Tell us what you know about our company.”
- “How can you best serve our most typical customer?”

If you answer this open-ended question with the obvious “the money” or something else self-serving such as “Because I think it’ll be a good career move,” you’ll immediately scare the employer into thinking that you’re too self-involved to have priorities inconsistent with the company’s. What they want to hear is something along the lines of their mission or vision statement and consistent with their own business goals. If your only motivation is what’s best for you, they’re going to think that you’ll just use the job as a stepping stone and leave as soon as something better comes along, requiring them to go through this tedious hiring process all over again six months.

Take this question as your cue to compliment the company and demonstrate what you know about them. Show that you’ve done your homework into both the company and position, and be specific in saying what you like about them, their products or services, and their workplace culture. If you can work into your answer how you’re going to be the solution to their problem, and if you can focus on how you see yourself serving the clientele as your main priority, you’ll be on your way to getting a job offer.

The absolute best answer will also convey **passion** for the work you’ll do. If you give the employer the sense that you absolutely love to do this kind of work and that you’ll be a happy camper doing it at their workplace, you’ll give them confidence in you as a sound long-term investment. They know that employees who enjoy the work are more productive and loyal, whereas those who drag themselves into work and are miserable in their role are an unproductive drag on operations. Expressing your passion for the work in a very enthusiastic tone will give the employer a great deal of confidence in you. Continuing that positive vibe throughout the interview will work in your favour when the interviewer reflects on which candidate would best succeed in the role.

10.3.2.3.3: “What are your strengths and weaknesses?”

- “What would your previous managers say are your best and worst qualities?”
- “Are there any reasons why we shouldn’t hire you?”

- “What experiences in this line of work have challenged your commitment to it and what experiences have bolstered your commitment to it?”

How you answer this tricky question, especially the “weaknesses” part, can either make or break you. Throughout the interview, you’re doing everything you can to avoid giving the employer a reason to not hire you, but you can’t answer this question without providing them with at least one. Omitting a weakness would show an inability to follow instructions, which no employer wants in an employee. There’s no way around it. So how can you answer this without ruining your chances? Follow this three-part message organization:

1. Strengths
2. Weakness + improvement on the weakness
3. Strengths

You can add more strengths at the beginning and the end depending on how much time you have, but don’t add more weaknesses. The idea here is much like the indirect approach or “poop sandwich” constructive criticism (see §4.1.2 or §8.3 above and §11.1.4.2 below) in that you surround the bad news with good news. Don’t lead with a weakness because doing so appears to prioritize your flaws above your strengths if they’re the first to come to mind. Don’t end with a weakness because that will sit with the listener when you finish talking, leaving them to mull over whether they really want someone with that kind of weakness. Instead, surround your weakness with strengths in the skills that the employer listed as required in the job posting, as well as personal qualities attractive to any employer, such as conscientiousness, the ability to learn quickly, and a positive attitude. Use this as an opportunity to summarize some of your 4-5 key points mentioned in §10.3.1.3 above, but be concise about them.

Think of your weakness as an area of improvement, not as a permanent disability, so that you can pivot from the weakness into the strength of self-improvement. If you give the employer a deal-breaker weakness that you’re unable or unwilling to improve upon, such as being too lazy or slow, having an intense hatred for people, or a serious addiction to alcohol or drugs, you give them too strong a reason not to hire you. If you go with the cliché answer of “I’m a perfectionist” thinking that you’re disguising a strength as a weakness and that the employer will appreciate someone who focuses on the details and stops at nothing to do their best work, they’ll see through the ruse because they’ve heard it all before. From a manager’s perspective, the problem with perfectionism is that it takes too long and is a liability at crunch times. If you use perfectionism or something like it as your weakness, follow up with an explanation of what you’re doing to improve on it. You could say that you used to be like that in high school, but crunch times in college have helped you make great strides at figuring out when it’s appropriate to move on from things of lesser importance when they’re 90% perfect so you can spend extra time on the things that really matter.

As another example, if you say that your weakness is that you tend to procrastinate too much, follow it up by saying you downloaded and follow an app that organizes your day to include limited time for relaxing diversion

when you're typically at your least productive so that you're more productive before and after. That way, you can pivot to strengths such as having good time management and self-awareness.

10.3.2.3.4: "Why did you leave your last job?"

Like the previous question, this one can be a trap if you answer in a way that makes you look like a poor long-term investment. When an employer wants to know that you'll commit to them, don't give the sense that you're chronically unfulfilled by your jobs or that you got fired for something awful you did. If your actual reason is that you didn't get along with management or coworkers, ranting about them here will give the employer the sense that you have problems with authority and will be similarly difficult in this workplace. Instead, answer with a narrative arc that positions your previous job as a pathway towards the job you really want: the one you're competing for here.

10.3.2.3.5: "Where do you see yourself in 5-10 years?"

- "What are your short- and long-term goals?"
- "What are your career plans?"

When the employer asks what your short- and long-term goals are, they're hoping you'll commit to them and the profession you've chosen, as well as hear some ambition for upward movement. They'll be unimpressed if you say that your ultimate goal is to work for another company (so you're just going to use them as a stepping stone) or another career. They may also feel sad for you if your goal is to still be doing the job they're hiring for after five years. They likely started at the bottom wrung themselves and worked their way up to the managerial, decision-maker position they're in now, so they'll respect someone who is willing to put in the time and effort to do the same. They may also think that they themselves will be moving on up from their current middle-management position to more senior positions, which will open up their current positions to be filled by the people who are now entry-level like you. Saying that you want your path to be something like theirs so that you'll look to them as a mentor can be both flattering and assuring that your loyalty will be to their company.

10.3.2.3.6: "Do you have any questions for us?"

Employers recognize that a job interview is a two-way street. They're assessing you at the same time that you're assessing them. Though they hold the balance of power because they have the money you're after, which gives them the right to ask the majority of questions, they'll usually give you the opportunity to interview them briefly at the end. Having nothing to ask will look bad because it suggests that you lack curiosity and haven't given much thought to the position and the company. Asking what your starting salary is will be considered rude, as will asking about other benefits; these are details to work out when they offer you the job,

not during the interview. Asking what a typical work day looks like will also suggest that you don't understand the position well enough to perform it.

If you researched both the position and company in your preparation, however, you will have inevitably seen things that piqued your curiosity or confused you about what the company does and what the position entails. Show that you did that research by asking those questions. If you see that the company engages charitably with community, for instance, ask how you can get involved. Asking what opportunities for advancement within the company suggests that you have ambition as well as loyalty to the company, and that you want to grow with them. You can also achieve this effect by asking about the company's short- and long-term strategic directions. Asking practical questions such as if there job involves training program in the first month shows that you have begun considering the realities of the position. Finally, asking when you can expect to hear back from them about their decision is fair for planning purposes.

10.3.2.4: How to Answer Behavioural Questions

- “Have you ever had to deal with a difficult co-worker, manager, or customer (or, in college, a difficult classmate or professor)?”
- “Describe how you took an innovative approach to solving a difficult problem in your last job or in college.”
- “How have you showed initiative or creativity in your previous job or in college?”
- “How do you manage your time effectively during crunch time? Would you sacrifice the quality of your work to meet a deadline or opt to meet expectations for quality but deliver the product late?”

One type of standard job interview question deserves special consideration because of the strategy required to answer it. The behavioural question asks either what you have done in a certain situation or, if you haven't encountered it previously, what you would do if you found yourself in that situation in the job you're applying for. The employer is here assessing for how you solve practical workplace problems, ideally by following some known formula for success or procedure with predictable outcomes. A very common such question is how you have dealt with a difficult co-worker, manager, or customer. The wrong answer would be any of the conflict responses described in §11.2.6-8, as would speaking harshly about the person you select to tell your story about. You must remain strictly positive throughout the interview to avoid inviting any negative impressions. Though some employers may state their expectations for how you structure your answer, those who don't will be impressed if you divided your answer into the four parts given in Table 10.3.2.4 below.

Table 10.3.2.4: Answering Behavioural Questions

Answer Part	Example
1. Describe the situation	Yes, I have encountered a difficult co-worker. I was the delivery supervisor of an organic grocery home delivery service. Dave, one of the warehouse workers, was upset about something and acting out, especially by taking pot-shots at the manager, Karin. The manager wasn't having any of it and was prepared to fire him.
2. Explain what you did about it	I chatted with Dave about it and it turned out that he had some good ideas about how to improve the warehouse operation—especially his part of it—but a personality clash with the manager meant that she didn't take him seriously and wouldn't listen to him. As a supervisor, I depended on good relations between both the warehouse and office staff, so I just went into full conflict-resolution mode, arranged for the two to sit down and listen to each other's concerns, and mediated to ensure the conversation stayed civil.
3. Explain the result of your actions	As a result of their conversation, they came to an amicable solution whereby Karin would let Dave implement his ideas on a trial basis for a few weeks and Dave would cool it with the anti-authority delinquency and apologize for the insults. His ideas improved the warehouse operation's efficiency measures by 15% and were adopted as an ongoing practice. After that, they got along just fine or at least tolerated each other.
4. Assess whether you would do the same again in the new workplace and what you learned by the experience	Given a similar situation here at Company Z, I would certainly do the same thing. It proved the productive power of listening to each other and talking out your differences as opposed to bickering and drastic measures that would lead to losing valuable perspectives.

If you can say in response to the question, “Honestly, I’ve never had to deal with a problem co-worker, manager, or customer because I’ve only ever had really positive relations with all,” stopping there would score poorly in the employer’s evaluation. It’s up to you to take the initiative to say, “. . . but if that ever *did* happen, I would probably apply what I know about conflict resolution,” and then proceed to explain what you would do in the hypothetical scenario. What’s important to the employer is that you have a plan and are aware of best-practice procedures for dealing with whatever situation they put you in.

10.3.2.5: Assess the Employer and Possibly Dodge Illegal Questions

Though you may enter the job interview feeling that they hold all the cards and the power is entirely theirs to accept or reject you, it could just as well go the other way depending on how in-demand you are and how desperate the employer is. An interview is a two-way exchange where both employer and job applicant have the opportunity to get to know each other better, and you might find that you either like or don’t like what you see just as much as the other way around. This means that while you’re trying to make yourself as attractive

as possible to win a job offer, be on the lookout for red flags suggesting that they're not the kind of employer you'd be happy working for, especially if you're good (or lucky) enough to have multiple job offers to choose from.

One sign of trouble that's easy to spot is if the interviewer asks questions that they are required by law *not* to ask a job candidate. Questions that produce responses that can be used to discriminate against the candidate are a Ontario Human Rights Code violation. Such questions include anything about your:

- **National origin, ethnicity, or religion**

- Exception: employers can ask if you are legally permitted to work in Canada
- More exceptions: if the organization serves a particular community and needs to hire within that community (e.g., a First Nations counsellor to serve indigenous youth or a service worker who speaks the language of a certain minority group highly concentrated in a particular area)

- **Age**

- Exception: if the organization serves a particular age group and needs to hire someone in that group (e.g., a youth group counsellor 25 years of age or under to serve 15- to 25-year-old youths)

- **Disabilities, health conditions, or physical characteristics unrelated to the job**

- Exception: if the employer asks about an obvious disability to determine what workplace accommodations are necessary
- Exception: if the employer is recruiting someone with a disability to serve individuals who also have disabilities

- Sexual orientation

- Relationship, marital, or family status

- Partner's employment

- Dependents (children), pregnancy, or intentions to have children (Ontario Human Rights Commission, 2009)

An employer asking you questions relating to any of the above puts you in an awkward position. If you feel that you no longer want the job because you get the sense that the employer would be a mistake to work for, you could certainly tell them that the *Ontario Human Rights Code* prohibits them from asking that question. If they're a small-business start-up, perhaps the employer wasn't aware of the *Code* and could benefit from knowing what they can and cannot ask. If you still want the job, however, and are worried that challenging the employer on the legality of the question will jeopardize your chances, you can try to joke or pivot your way out of answering. If you don't get the job and you suspect it has to do with discrimination related to the illegal question or your refusal to answer it, you can bring a *Human Rights Code* violation complaint (called an

application) against the employer to the Human Rights Tribunal of Ontario following advice from the Human Rights Legal Support Centre.

10.3.2.6: Nonverbal Behaviour

Nearly as important as what you say during an interview is how you say it—both in terms of your tone of voice and body language. Modulate your voice so that it follows the normal conversational rhythms and high-to-low shifts in volume and pitch appropriate for what you say, while trending often towards high pitch and volume to convey a sense of enthusiasm. Enthusiasm is contagious; if you're enthusiastic about the job, the employer will be enthusiastic about you. A robotic monotone, on the other hand, risks boring your audience to sleep. Your facial expressions should be consistent with that enthusiasm, frequent flashing smiles, raised eyebrows, wide eyes, and head-nodding to effect a positive, high-energy vibe. Like a monotone voice, an expressionless deadpan appearance will be hard to read, on the other hand, and suggest that you're bored with the interview and will be dissatisfied with the job, even if it's actually your way of suppressing nervous behaviour by appearing calm. At the negative extreme, frequently furrowing your brow (even in concentration) and grimacing will give the impression that you tend towards an angry or haughty disposition, which will be a drag to have around.

Control your posture and hand movements to complement your responses. Sit erect and even lean in occasionally to appear attentive and actively listening to questions, as well as to appear excited when responding. Balance this by also loosening up, leaning back, and looking relaxed when the room calls for it with its own easy-going mood (see §10.1.3.1 above for more on the benefits of social mirroring). Sitting perfectly erect for too long will make you look stiff and robotic or petrified in nervousness. Looking too relaxed the whole time, however, will suggest that you don't care much about the job and the people there, or that you're too tired because you stayed up late the night before and would probably do the same and be unproductive if you got the job. If you need to keep your hands tucked away because their shaking would give away your nervousness, that's fine. Otherwise, use moderately animated hand gestures to emphasize your spoken points as you naturally would in conversation.

Above all else, maintain good eye contact. Looking the person you're speaking to steadily in the eyes conveys a sense of confidence in what you're saying and builds trust. Constantly looking down or away suggests either nervousness and a lack of confidence in what you're saying or a mental struggle to remember points and articulate concepts that really should come easily to mind if you're truly suited for the position. If the questions come to you from a panel, look primarily in the eyes of the one asking the question, but also share your eye contact methodically with everyone else on the hiring committee sitting across from you. Managed effectively, all of these subtle nonverbals suggest the kind of social competence and confidence that would make you successful in the position at hand.

10.3.2.7: Make a Strong Lasting Impression

The **recency effect** in psychology (see §4.1 above) demands that you leave a strong, positive impression in your audience's mind if you want them to remember you favourably. You can achieve this if, in the final moments with the interviewers, your behaviour is consistent with the rest of your interview performance if you were doing it right: positive and enthusiastic. The final impression you want to make is that, even after a possibly gruelling interview, you are even more interested in the position than you were before. Only candidates who really want the job and enjoyed talking about it will be considered for a job offer, whereas those who just appeared nervous or were difficult to read because of their aloof, deadpan robotic nonverbals will hardly give the employer confidence in their abilities.

Be warm and friendly in your parting words. Keep smiling, say that it was a pleasure speaking with them, and use the names they used during the introductions. "Thank you so much for taking the time to speak with me about the position. I'm really looking forward to hearing from you. It was a pleasure, Keith [said while shaking Keith's hand]. Thanks again, Dora. Hope to see you again, Helen." As you leave the room, walk confidently with a slight bounce in your step.

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10.3.3: Post-interview Follow-up Messages

The day after a job interview, write a follow-up email thanking the employer for their time and interest. Though you may consider this an optional cherry on top of a successful job interview, it's really more of an expected formality in the modern job interview process. When the hiring committee meets to discuss the five or six candidates who interviewed, those who neglected to send a thank-you note will look uncaring or neglectful compared to those who demonstrated thoughtful and considerate gratitude by writing a note. The message need not be long, but must be well written and error free. A message along the lines of the example below would suffice to show that you're still interested in the job and the company.

Dear Mrs. Harrington:

Please allow me to thank you for your time and the opportunity to talk about the Software Developer position at your office yesterday. Enjoying our conversation immensely convinced me that I would be a great fit in your company.

Developing software has been my greatest passion these past six years, and supporting Company Z's bid for market dominance in the years ahead would be my dream job.

Please let me know if I can do anything to help make your decision easier. Otherwise, I am very much looking forward to hearing from you next week.

Warm regards,

Marcos

Once this message goes out, move on. As good as you might feel about how you did, you won't have any idea what they decide until you hear back from them. Sometimes the best candidate doesn't get the job after all, so don't torture yourself by checking your phone and email every five minutes for the good or bad news. Instead, focus on your next applications. When your job is to get a job, it should be a full-time occupation that you don't rest from until you accept a job offer.

If you get a follow-up message saying that another candidate better suited what the selection committee was looking for, feeling dejected and getting upset is a natural reaction to the bad news. What's really important at this point is that you do two things: (1) *don't* respond angrily by demanding a reason why you were rejected or what the winning candidate had over you. The employer will simply be protecting itself from legal action when they say that they can't go into detail about their decision, especially because all of the people on the committee will likely have signed confidentiality agreements to not discuss their decisions with anyone outside of the committee. Instead, accept defeat gracefully. Who knows—they may have been impressed enough that when they follow-through on plans to hire again in six months, they'll have you in mind—unless you blow it by burning the bridge in an angry response to rejection.

(2) Learn from the experience. The more interviews you do, the more you figure out what works and what doesn't based on reading the reactions around the room and how you feel afterwards. Reflect on where you could have improved and keep a set of notes on what you would do better next time. In the meantime, keep applying to other positions, building your professional network, and even add skill sets and educational experience that would better position you for the jobs you want.

If you decide on the basis of the interview to withdraw from the competition before the company even sends you their decision, the courteous thing to do would be to immediately send a polite message explaining that you would no longer like to be considered for the position. Courtesy in this case is especially important if your reason is that you accepted a job offer from a more attractive company. You don't have to say that that's the reason, but you want to keep the door open to the company you're rejecting in case it doesn't work out with the company you're going with after all. You may not get a second chance with the company you're rejecting, but you definitely won't if you burn that bridge with a snarky email, and you never know who they might talk to (a future potential employer?) about any untoward behaviour.

If all goes well and you get a job offer or if you're informed that you're the leading candidate either by phone or by email, of course you should express your excitement and gratitude for them selecting you. From there, you may have several formalities to follow through on such as submitting the names and contact information of references and filling out other paperwork, all of which you must do promptly and perfectly lest your success be still dependent on your degree of compliance through the confirmation process.

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Key Takeaway



Considering that a job interview is an oral communication test, study for it the way you would any other important exam: by anticipating questions, practicing your responses, and rehearsing with timed trials; for the interview itself, control everything in your power to win the job competition with your best possible performance.

Exercises



1. Conduct a mock job interview with a classmate where you both take turns as interviewer and interviewee. Use some of the standard question variations given throughout §10.3.2.3 and §10.3.2.4 as a basis for your list of questions, but modify them to suit the profession you are training for. As a basis for your role-play scenario, use the job posting that you selected and wrote a targeted résumé and cover letter for in the Ch. 9 end-of-section Exercises.
2. Book an appointment with an Algonquin College Employment Support Centre tutor for advice and a mock job interview based on the same job posting and application you assembled for the Ch. 9 end-of-section Exercises.

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10.4: INTERCULTURAL COMMUNICATION

Learning Objectives



5. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
11. Define intercultural communication in the context of professional interactions.
12. Explain the process by which we join and participate in a culture such as in the workplace.
13. Identify dimensions of cultural difference from a sociological perspective.
14. Explain strategies for how to establish and maintain friendly professional relations with people from different cultures.

All communication is intercultural. The term “intercultural communication” may conjure in your mind a picture of two people from different continents speaking or writing to one another. Considering the vast size of Canada and wide variety of cultures from the west coast to the Maritimes, however, or from northern communities to the border-lining south, or from Indigenous peoples to first-generation immigrants, all communication in Canada is intercultural. You can hear it in the diverse accents across the provinces and even within a province from urban to suburban to rural cultures. Even within a household, parents represent one culture influenced by the decades preceding their kids, who have their own culture with its own dialect and media preferences. This argument extends even as far as your individual self; when you’re at odds with yourself about something, where does that internal conflict come from but the various cultures you’ve internalized through the years? Every culture you’ve ever participated in has left its mark on you with a set of perspectives and values that shape your worldview and behaviour. Still, you’re a cohesive self rather than a fractured and divided one, which suggests we can all get along with one another despite our cultural differences.

Always approach intercultural communication as an opportunity to overcome cultural differences and achieve the cross-cultural understanding you need to be a better person and do your job effectively in a multicultural environment. When you enter a profession, you begin to internalize a new workplace culture and therefore a new set of values. You represent that culture (and even subculture within a company) to the

various audiences you deal with: customers or clients outside, management above, and colleagues in adjacent departments. In all such interactions, your goal is to find a common language that helps get the job done. Intercultural communication is thus vital to your success.

On the other hand, if you're ethnocentric in the sense of being fearful, intolerant, or even just avoidant towards those other cultures—be they on the other side of the planet, country, province, city, building, counter, or desk—you limit your opportunities for success in the globalized market. Even engaging other cultures with simplistic, preconceived notions informed by media stereotypes reducing everyone in a culture to a one-dimensional character or prop will similarly lead you into serious error. Intercultural communication requires openness to difference, patience in overcoming cultural and language barriers, and the desire to learn about other cultures and points of view.

If your work brings you into contact with cultures that you know little about, forget the stereotypes and learn about their culture by both researching it and talking to them respectfully. Along these lines, this chapter section provides a guide for how to approach intercultural communication in the modern workplace by considering what you share in common with the people you interact with, what to look for in terms of cultural differences, and how to act in either case. Though we don't have room for a thorough guide on specific cultural differences pertaining to every unique culture you might encounter, we will focus on basic principles for conducting intercultural communication (*Business Communication for Success*, 2015, 18.1 – 18.2).

Intercultural Communication Topics

- 10.4.1: Common Cultural Characteristics
- 10.4.2: Understanding and Respecting Cultural Differences

10.4.1: Common Cultural Characteristics

While we may be members of many different cultures, we tend to identify with some more than others. Perhaps you have become friendly with several of your classmates in your college program. As you take many of the same classes and share on-campus experiences, you share more and more in common, forming a small group culture of your own. A similar cultural formation process happens in the workplace where coworkers spend many hours each week sharing work experiences and getting to know each other socially in the process. Let's look at how each of these shared experiences is an important communication function.

10.4.1.1: Rites of Initiation and Adopting a Common Language

Cultures tend to have a ritual for welcoming a new member. Some such rituals may be so informal as to be hardly noticed, such as when you are invited to lunch so your new team members can get to know you. Others

may be highly formalized such as religious rites. In your life, you've passed through rites such as the first day of school, high-school graduation and prom, getting your driver's license, registering to vote, and getting your first job. Each passage into a new culture and its associated responsibilities requires your participation as a communicator, such as learning traffic signs and how to signal your intention to turn your vehicle.

After the written and oral communications tests of getting your first job (see Ch. 9 and §10.3 respectively), the biggest challenge of your first day on the job is to learn how the group members communicate with each other. You'll have learned much of the technical terminology and jargon in your college program, but then you'll find that working professionals have changed it to suit their purposes and added new lingo for you to master. Learning to "talk the talk" is vital to passing the rite of initiation, becoming a full member of that workplace culture, successfully completing your work, and rising to positions of greater status and responsibility.

10.4.1.2: Common Values and Goals

Cultures all hold values and principles that are commonly shared and communicated by established members to newer ones. Time and length of commitment are associated with an awareness of these values and principles so that new members, whether they are socialized at home, in school, or at work, may not have a thorough understanding of their importance. For example, rapid customer service and cleanliness are two cornerstone values of the Tim Hortons franchise. A new employee may take these for granted if not for seasoned employees and management communicating and reinforcing these core values. Without reinforcement, norms may gradually shift and fundamentally change the customer experience associated with franchise brand.

Cultures likewise share common goals. Companies often state these in mission and vision statements (usually stated on the "About" page of the company website) that individual members are expected to acknowledge, adopt, and realize through action. Without action, the **mission and vision statements** are simply empty abstractions. As a guide to individual and group behavioural norms, they can serve as a powerful motivator and a call to action (*Business Communication for Success*, 2015, 18.3).

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10.4.2: Understanding and Respecting Cultural Differences

Successfully communicating across cultures requires understanding and respecting how the culture or cultures you represent differ from those of the people you're communicating with. While you may think that you should just follow the golden rule and treat everyone else the way you would like to be treated yourself, the more you travel to distant lands, the more you realize that cultural conventions and expectations for how

people would like to be treated are relative. One culture will place a high value on a friendly handshake and eye contact, while you would come off as aggressive or awkward if you did those things well in another.

Though you can't be expected to know every little custom across the planet, having a general sense of large-scale cultural differences and a willingness to learn the details as necessary can save you from embarrassing yourself or offending people of different cultures when interacting with them. An open approach to cultural differences can also impress your audiences in ways favourable to your reputation and the organization you represent. With these goals in mind, let's consider the following dimensions of cultural difference from the perspective of social anthropology.

- 10.4.2.1: Individualistic *vs.* Collectivist Cultures
- 10.4.2.2: Explicit-rule *vs.* Implicit-rule Cultures
- 10.4.2.3: Uncertainty-Accepting *vs.* Uncertainty-Rejecting Cultures
- 10.4.2.4: Time Orientation
- 10.4.2.5: Short-term *vs.* Long-term Orientation
- 10.4.2.6: Masculine *vs.* Feminine Orientation
- 10.4.2.7: Direct *vs.* Indirect Communication Cultures
- 10.4.2.8: Materialism *vs.* Relationship-based Cultures
- 10.4.2.9: Low-power *vs.* High-power Distance Cultures

10.4.2.1: Individualistic *vs.* Collectivist Cultures

People in **individualistic cultures** value individual freedom and personal independence as reflected in the stories they tell themselves. The story of Superman co-created by Canadian-born artist Joe Shuster, for instance, reflects North American culture's fondness for the heroic individual overcoming foes and obstacles through inner strength. Canada in particular favours heroes with significant pro-social achievements such as hockey legend Wayne Gretzky, who racked up more regular-season career points in assists alone (1963) than the second best point scorer did in both goals and assists combined (Jaromir Jagr with 1921). Still, we celebrate the individual hockey hero in the Hall of Fame more than the teams that helped them set their records.

However, as a pluralistic society blending a wide diversity of cultures, especially with a large immigrant population from typically collectivist cultures, 21st-century Canada can't be so easily reduced to an individualistic culture. You may belong to some communities that express individualistic cultural values, while others place the focus on a collectivist viewpoint. Besides, individualism and collectivism aren't so much either/or cultural values as they are tendencies on a sliding scale.

According to Geert Hofstede (1982), **collectivist cultures**, such as many in Asia and South America, focus on the needs of the nation, community, family, or group of workers. Ownership and private property is one way to examine this difference. In some cultures, property is almost exclusively private while others tend toward community ownership. The collectively owned resource returns benefits to the community. Water, for

example, has long been viewed as a community resource, much like air, though this is compromised as business and organizations purchase water rights and gain control over resources. Public lands such as parks are often considered public, and individual exploitation of them is restricted. Copper, a metal with a variety of industrial applications, is collectively owned in Chile with profits deposited in the general government fund. So how does someone raised in a culture that emphasizes the community interact with someone raised in a primarily individualistic culture? How could tensions be expressed and how might interactions be influenced by this point of divergence? The answer begins with understanding and respecting a different cultural orientation, and the practicalities involve mutual compromise.

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10.4.2.2: Explicit-rule vs. Implicit-rule Cultures

Do you know the rules of your business or organization? Did you learn them from an employee manual or by observing the conduct of others? Your response may include both options, but not all cultures communicate rules in the same way. Having found quite a range of difference, Carley Dodd (1998) discusses how, in an explicit-rule culture where rules are clearly communicated so that everyone is aware of them, the guidelines and agenda for a meeting are announced prior to it. In an implicit-rule culture where rules are often understood and communicated nonverbally, there may be no such agenda. Everyone knows why they are gathered and what role each member plays, even though the expectations may not be clearly stated. Power, status, and behavioural expectations may all be understood, and to the person from outside this culture, it may prove a challenge to understand the rules of context.

Outsiders often communicate their “otherness” by not knowing where to stand, when to sit, or how to initiate a conversation if the rules are not clearly stated. While it may help to know that implicit-rule cultures are often more tolerant of deviation from the understood rules, the newcomer must learn by observing quietly after doing as much research as possible ahead of the event.

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10.4.2.3: Uncertainty-Accepting vs. Uncertainty-Rejecting Cultures

When we meet each other for the first time, we often use what we have previously learned to understand our current context. We also do this to reduce our uncertainty. Some cultures, such as the North American and

British generally, are highly tolerant of uncertainty, while others go to great lengths to reduce the element of surprise. Cultures in the Arab world, for example, are high in uncertainty avoidance; they tend to be resistant to change and reluctant to take risks. Whereas a Canadian business negotiator might enthusiastically agree to try a new procedure, the Egyptian counterpart would likely refuse to get involved until all the details are worked out.

Charles Berger and Richard Calabrese (1975) developed uncertainty reduction theory to examine this dynamic aspect of communication. Their seven axioms of uncertainty are as follows:

1. There is a high level of uncertainty at first contact in any interaction between unknown parties. As we get to know one another, our verbal communication increases and our uncertainty begins to decrease.
2. Following verbal communication, nonverbal communication increases, uncertainty continues to decrease, and more nonverbal displays of affiliation, like smiling and nodding one's head to indicate agreement, will start to be expressed.
3. To overcome high levels of uncertainty, we tend to increase our information-seeking behaviour, perhaps asking questions to gain more insight. As our understanding increases, uncertainty decreases, as does the information-seeking behaviour.
4. When experiencing high levels of uncertainty, the communication interaction is not as personal or intimate. As uncertainty is reduced, intimacy increases.
5. When experiencing high levels of uncertainty, communication will feature more reciprocity (see §10.1.3.1 for more on social mirroring) or displays of respect. As uncertainty decreases, reciprocity may diminish.
6. Differences between people increase uncertainty, while similarities decrease it.
7. Higher levels of uncertainty are associated with the diminished likability of the other person, while reductions in uncertainty are associated with liking the other person more.

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10.4.2.4: Time Orientation

Edward T. Hall and Mildred Reed Hall (1990) state that **monochronic** time-oriented cultures consider one thing at a time, whereas polychronic time-oriented cultures schedule many things at one time, and time is considered in a more fluid sense. In monochronic time, interruptions are to be avoided, and everything has its own specific time. Even the multitasker from a monochronic culture will, for example, recognize the value of work first before play or personal time. Canada, the United States, Germany, and Switzerland are often renowned for being countries that value a monochronic time orientation. Such generalizations break down in

specific regions, however, such as indigenous communities or coastal island cultures within Canada, which are more likely to be monochronic's opposite.

With business, family, and social life mixing more freely, **polychronic** time-oriented cultures tend to challenge the monochronic outsider. In Greece, Italy, Chile, and Saudi Arabia, for instance, business meetings may be scheduled at a certain time, but when they actually begin may be another story. If an invitation to dinner says it starts at 8pm, it might as well say 9pm. If you were to show up at 8pm, you might be the first person to arrive and find the hosts unready for you. Likewise, a polychronically oriented person who crosses into a monochronic culture for a 3pm meeting and arrives at 3:44pm will disappoint all who took pains to be there at 2:55pm for the 3pm start.

If you're oriented monochronically and suspect that you find yourself in a polychronic culture, always ask before the event; many people in such cultures will be used to outsiders' tendency to be punctual, even compulsive, about respecting established times for events. The skilled business communicator is aware of this difference and takes steps to anticipate it. The value of time in different cultures is expressed in many ways, and your understanding can help you communicate more effectively.

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10.4.2.5: Short-term vs. Long-term Orientation

Do you want your reward right now or can you dedicate yourself to a long-term goal? You may work in a culture whose people value immediate results and grow impatient when those results do not materialize. Geert Hofstede discusses this relationship of time orientation to a culture as a "time horizon," and it underscores the perspective of the individual within a cultural context. Many countries in Asia, influenced by the teachings of Confucius, value a long-term orientation, whereas other continents such as North America have a more short-term approach to life and results. Indigenous cultures within North America, however, are known for holding a long-term orientation, as illustrated by the proverb attributed to the Iroquois that decisions require contemplation of their impact seven generations removed.

If you work within a culture that has a **short-term orientation**, you may need to place greater emphasis on reciprocating greetings, gifts, and rewards. For example, if you send a thank-you note the morning after being treated to a business dinner, your host will appreciate your promptness. While there may be a respect for tradition, there is also an emphasis on personal representation and honour as reflections of identity and integrity. Short-term oriented cultures also value personal stability and consistency, contributing to an overall sense of predictability and familiarity.

Long-term oriented cultures such as in Asia value delayed gratification, perseverance, thrift and frugality, and a social hierarchy based on age and status. A sense of shame for the family and community is also observed

across generations. What an individual does reflects on the family and is carried by immediate and extended family members.

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10.4.2.6: Masculine vs. Feminine Orientation

Characterizing a whole culture as masculine or feminine according to stereotypes associated with both can be a fool's errand, especially in the West where gender politics is hotly contested between liberal and conservative factions. Conservatism generally clings to a traditional notion of a masculine society, whereas feminist-friendly liberalism generally embraces equal opportunity and even female power. Still, many cultures across the globe have long traditions of either patriarchal (male-dominant) or matriarchal (female-dominant) social orientations. Each carries with it a set of cultural expectations and norms for gender behaviour and gender roles across life, including business.

Hofstede, Hofstede, and Minkov (2010) describe the masculine-feminine dichotomy not in terms of whether men or women hold the power in a given culture, but rather the extent to which that culture values certain traits that may be considered masculine or feminine. Thus,

the assertive pole has been called “masculine” and the modest, caring pole “feminine.” The women in feminine countries have the same modest, caring values as the men; in the masculine countries they are somewhat assertive and competitive, but not as much as the men, so that these countries show a gap between men's values and women's values. (Hofstede, Hofstede, & Minkov, 2010)

We can observe this difference wherever people gather, how they interact, and how they dress. We can see it during business negotiations where it may make an important difference in the success of the organizations involved. Cultural expectations precede the interaction, so someone who doesn't match those expectations may experience tension. According to Hofstede et al., business in the United States has a masculine orientation where assertiveness and competition are highly valued. In other cultures such as Sweden, business values are more attuned to modesty (lack of self-promotion) and taking care of society's weaker members. On a sliding scale, Canada is somewhere between these poles. This range of difference is one aspect of intercultural communication that requires significant attention when the business communicator enters a new environment.

- Return to the §10.4.2: Understanding and Respecting Cultural Differences introduction
- Return to the Intercultural Communication Topics menu

10.4.2.7: Direct vs. Indirect Communication Cultures

In North America, business correspondence is expected to be short and to the point (see §4.5.2.2 above on conciseness and §4.1.2 on direct vs. indirect messages). “What can I do for you?” is a common question when an employee receives a call from a stranger. It is an accepted way of asking the caller to skip or minimize pleasantries and get on with their business. In indirect cultures, such as in Latin America, business conversations may start with discussions of the weather, family, or topics other than the business at hand as the partners get a sense of each other long before the main topic is raised. Again, the skilled business communicator researches the new environment before entering it because an avoidable social faux pas, or error, can have a significant impact.

- Return to the §10.4.2: Understanding and Respecting Cultural Differences introduction
- Return to the Intercultural Communication Topics menu

10.4.2.8: Materialism vs. Relationship-based Cultures

Does the car someone drives say something about them? You may consider that many people across the planet do not own a vehicle and that a car or truck is a statement of wealth. Beyond that, however, do the make and model reflect the driver’s personality? If you represent a materialistic culture, you may be inclined to say Yes. If you’re from a culture that values relationships rather than material objects, you may say No or focus on how the vehicle serves the family. From rocks that display beauty and wealth (jewelry) to what you eat (will it be lobster ravioli or prime rib?), we express our values and cultural differences with our purchase decisions.

Members of a materialistic culture place emphasis on external goods and services as a representation of self, power, and social rank. If you see a plate of food and consider the labour required to harvest the grain, butcher the animal, and cook the meal, you are focusing more on the relationships involved with its production than the foods themselves. Caviar may be a luxury, and it may communicate your ability to acquire and offer a delicacy, but it also represents the efforts of those who harvested it. Cultures differ in how they view material objects and their relationship to them, and some value people and relationships more than the objects themselves. The United States and Japan are often noted as materialistic cultures, while many Scandinavian nations feature cultures that place more emphasis on relationships. Again, Canada might be somewhere between these ends of the scale.

- Return to the §10.4.2: Understanding and Respecting Cultural Differences introduction
- Return to the Intercultural Communication Topics menu

10.4.2.9: Low-power vs. High-power Distance Cultures

How comfortable are you with critiquing your boss's decisions? If you are from a low-power distance culture, your answer might be "no problem." In low-power distance cultures, according to Hofstede, people relate to one another more as equals and less as a reflection of dominant or subordinate roles, regardless of their actual formal roles as employee and manager, for example.

In a high-power distance culture, you'd probably be much less likely to challenge the decision, to provide an alternative, or to give input to someone superior to you in the social hierarchy. When working with people from a high-power distance culture, you may need to take extra care to offer feedback and even wait to approach them on their terms because their cultural framework may discourage such a casual attitude to authority. They may have learned that less powerful people must accept decisions without comment, even if those people have a concern or know of a significant problem vital to the operation. Unless you're sensitive to cultural orientation and power distance, you may either risk giving offense or be responsible for some major miscommunication (*Business Communication for Success*, 2015, 18.4).

- Return to the §10.4.2: Understanding and Respecting Cultural Differences introduction
- Return to the Intercultural Communication Topics menu

Key Takeaway



All communication is intercultural communication, which requires an open attitude to understanding and accommodating cultural differences in the workplace to make business connections.

Exercises

1. List all of the distinct cultures you identify with in order of the extent of how much sway you feel they hold over you. For each one, describe the rites of initiation you experienced upon entering that culture, as well as some of the values and principles associated with it.

2. Research and write a short report on a culture very different from your own. It may be one on another continent or one closer to home, yet still so distinct that you don't fully understand yet why people in that culture do the things they do. Make it your mission to understand why. What cultural characteristics distinguish it from your own (use §10.4.2 on cultural differences as our guide)? Despite these differences, what cultural characteristics do you share in common?
3. Consider a few basic types of nonverbal interaction:
 - i. Maintaining direct eye contact
 - ii. Shaking hands
 - iii. Holding hands
4. What cultures encourage these kinds of contact between people who have just met? What cultures discourage them and why? (Identify particular countries or communities near your own.) How do gender differences affect these customs in the countries or communities you covered?

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PART V

UNIT 5: PRESENTATIONS AND GROUP COMMUNICATION



Common COMM Course Learning

Outcomes

This unit supports the following course learning outcomes (*COMM 3048, COMM 3073, COMM 3074, COMM 3075, COMM 3077, COMM 3080, COMM 3082*):

- **2. Analyze** an audience and tailor a message to that audience (objective/subjective writing, persuasive writing, internal/external audience).
- **6. Perform** an effective presentation.

COMM 3020:

- **1. Communicate** clearly, concisely and correctly in the written, spoken and visual form that fulfills the purpose and meets the needs of the audience.
- **6. Deliver** a persuasive presentation on a business-related topic.

CHAPTER 11: GROUP COMMUNICATION

Jordan Smith

Chapter Learning Objectives

1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
2. Define teamwork in professional settings.
3. Compare and contrast positive and negative team roles and behaviours in the workplace.
4. Discuss group strategies for solving problems.
5. Demonstrate best practices in delivering constructive criticism and bad news in person.
6. Rank several types of response to conflict in the workplace in order of most appropriate to least.
7. Explain a collaborative approach to resolving workplace conflict.
8. Explain the purpose and contents of the meeting agenda and minutes.
9. Demonstrate best practices in web conferencing for professional situations.

Almost every posting for a job opening in a workplace location lists teamwork among the required skills. Why? Is it because every employer writing a job posting copies other job postings? No, it's because every employer's business success absolutely depends on people working well in teams to get the job done. A high-functioning, cohesive, and efficient team is essential to workplace productivity anywhere you have three or more people working together. Effective teamwork means working together toward a common goal guided by a common vision, and it's a mighty force when firing on all cylinders. "Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has" (Sommers & Dineen, 1984, p. 158).

- 11.1: Teamwork
- 11.2: Conflict Resolution Strategies
- 11.3: Group Meetings and Web Conferencing

11.1: TEAMWORK

Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
2. Define teamwork in professional settings.
3. Compare and contrast positive and negative team roles and behaviours in the workplace.
4. Discuss group strategies for solving problems.
5. Demonstrate best practices in delivering constructive criticism and bad news in person.

Almost every posting for a job opening in a workplace location lists teamwork among the required skills. Why? Is it because every employer writing a job posting copies other job postings? No, it's because every employer's business success absolutely depends on people working well in teams to get the job done. A high-functioning, cohesive, and efficient team is essential to workplace productivity anywhere you have three or more people working together. Effective teamwork means working together toward a common goal guided by a common vision, and it's a mighty force when firing on all cylinders. "Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has" (Sommers & Dineen, 1984, p. 158).

Compared with several people working independently, teams maximize productivity through collaborative problem solving. When each member brings a unique combination of skills, talents, experience, and education, their combined efforts make the team synergistic—i.e., more than the sum of its parts. Collaboration can motivate and result in creative solutions not possible in single-contractor projects. The range of views and diversity can energize the process, helping address creative blocks and stalemates. While the "work" part of "teamwork" may be engaging or even fun, it also requires effort and commitment to a production schedule that depends on the successful completion of individual and group responsibilities for the whole project to finish in a timely manner. Like a chain, the team is only as strong as its weakest member.

Teamwork is not without its challenges. The work itself may prove to be difficult as members juggle

competing assignments and personal commitments. The work may also be compromised if team members are expected to conform and pressured to follow a plan, perform a procedure, or use a product that they themselves have not developed or don't support. **Groupthink**, or the tendency to accept the group's ideas and actions in spite of individual concerns, can also compromise the process and reduce efficiency. Personalities, competition, and internal conflict can factor into a team's failure to produce, which is why care must be taken in how teams are assembled and managed.

John Thill and Courtland Bovee advocate for the following considerations when setting up a team:

- Select team members wisely
- Select a responsible leader
- Promote cooperation
- Clarify goals
- Elicit commitment
- Clarify responsibilities
- Instill prompt action
- Apply technology
- Ensure technological compatibility
- Provide prompt feedback

Group dynamics involve the interactions and processes of a team and influence the degree to which members feel a part of the goal and mission. A team with a strong identity can prove to be a powerful force. One that exerts too much control over individual members, however, runs the risk of reducing creative interactions, resulting in tunnel vision. A team that exerts too little control, neglecting all concern for process and areas of specific responsibility, may go nowhere. Striking a balance between motivation and encouragement is key to maximizing group productivity.

A skilled business communicator creates a positive team by first selecting members based on their areas of skill and expertise. Attention to each member's style of communication also ensures the team's smooth operation. If their talents are essential, introverts who prefer working alone may need additional encouragement to participate. Extroverts may need encouragement to listen to others and not dominate the conversation. Both are necessary, however, so the selecting for a diverse group of team members deserves serious consideration.

Teamwork Topics

- 11.1.1: Positive and Negative Team Member Roles
- 11.1.2: Team Problem-solving
- 11.1.3: Leading Teams
- 11.1.4: Constructive Criticism

- 11.1.5: Communicating Bad News in Person

11.1.1: Positive and Negative Team Member Roles

When a manager selects a team for a particular project, its success depends on its members filling various positive roles. There are a few standard roles that must be represented to achieve the team’s goals, but diversity is also key. Without an initiator-coordinator stepping up into a leadership position, for instance, the team will be a non-starter because team members such as the elaborator will just wait for more direction from the manager, who is busy with other things (see §10.3.3 below for more on leadership). If all the team members commit to filling a leadership role, however, the group will stall from the get-go with power struggles until the most dominant personality vanquishes the others, who will be bitterly unproductive relegated to a subordinate worker-bee role. A good manager must therefore be a good psychologist in building a team with diverse personality types and talents. Table 10.4.1a below captures some of these roles.

Table 11.1.1a: Positive Group Roles

Role	Actions
Initiator-coordinator	Suggests new ideas or new ways of looking at the problem
Elaborator	Builds on ideas and provides examples
Coordinator	Brings ideas, information, and suggestions together
Evaluator-critic	Evaluates ideas and provides constructive criticism
Recorder	Records ideas, examples, suggestions, and critiques
Comic relief	Uses humour to keep the team happy

Of course, each team member here contributes work irrespective of their typical roles. The groupmate who always wanted to be recorder in high school because they thought that all they had to do was jot down some notes about what other people said and did, and otherwise contributed nothing, would be a liability as a slacker in a workplace team. We must therefore contrast the above roles with negative roles, some of which are captured in Table 10.3.1b below.

Table 11.1.1b: Negative Group Roles

Role	Actions
Dominator	Dominates discussion so others can't take their turn
Recognition seeker	Seeks attention by relating discussion to their actions
Special-interest pleader	Relates discussion to special interests or personal agenda
Blocker	Blocks attempts at consensus consistently
Slacker	Does little-to-no work, forcing others to pick up the slack
Joker or clown	Seeks attention through humour and distracting members

(Beene & Sheats, 1948; McLean, 2005)

Whether a team member has a positive or negative effect often depends on context. Just as the class clown can provide some much-needed comic relief when the timing's right, they can also impede productivity when they merely distract members during work periods. An initiator-coordinator gets things started and provides direction, but a dominator will put down others' ideas, belittle their contributions, and ultimately force people to contribute little and withdraw partially or altogether. (*Business Communication for Success*, 2015, 19.2).

Perhaps the worst of all roles is the slacker. If you consider a game of tug-o-war between two teams of even strength, success depends on everyone on the team pulling as hard as they would if they were in a one-on-one match. The tendency of many, however, is to slack off a little, thinking that their contribution won't be noticed and that everyone else on the team will make up for their lack of effort. The team's work output will be much less than the sum of its parts, however, if everyone else thinks this, too. Preventing slacker tendencies requires clearly articulating in writing the expectations for everyone's individual contributions. With such a contract to measure individual performance, each member can be held accountable for their work and take pride in their contribution to solving all the problems that the team overcame on its road to success.

[Return to the Teamwork Topics menu](#)

11.1.2: Team Problem-solving

No matter who you are or where you live, problems are an inevitable part of life. This is true for groups as much as for individuals. Some especially work teams are formed specifically to solve problems. Other groups encounter problems for a wide variety of reasons. A problem might be important to the success of the operation, such as increasing sales or minimizing burnout, or it could be dysfunctional group dynamics such as some team members contributing more effort than others yet achieving worse results. Whatever the problem, having the resources of a group can be an advantage as different people can contribute different ideas for how to reach a satisfactory solution.

Once a group encounters a problem, questions that come up range from “Where do we start?” to “How do we solve it?” While there are many approaches to a problem, the American educational philosopher John Dewey’s reflective thinking sequence has stood the test of time. This seven-step process (Adler, 1996) produces positive results and serves as a handy organizational structure. If you are a member of a group that needs to solve a problem and don’t know where to start, consider these seven simple steps in a format adapted from Scott McLean (2005):

1. Define the problem
2. Analyze the problem
3. Establish criteria for a successful resolution to the problem
4. Consider possible solutions
5. Decide on a solution or a select combination of solutions
6. Implement the solution(s)
7. Follow up on the solution(s)

Let’s discuss each step in detail.

11.1.2.1: Define the Problem

If you don’t know what the problem is, how do you know you can solve it? Defining the problem allows the group to set boundaries of what the problem is and what it isn’t, as well as to begin formalizing a description of the scope, size, or extent of the challenge the group will address. A problem that is too broadly defined can overwhelm the group and make getting started even more challenging. If the problem is too narrowly defined, however, important considerations that, if addressed, might help successfully resolve the problem will fall outside of the scope, guaranteeing failure.

Let’s say there’s a web-based company called Fan Favourites that needs to increase its customer base and ultimately sales. The manager assembles key players into a problem-solving group that starts by formulating a working definition of the problem. If it’s “Sales are off, our numbers are down, and we need more customers,” it would be too broad to map out a feasible roadmap to resolution. A more precise definition such as the following, however, would provide more specific direction:

Sales have been slipping incrementally for six of the past nine months and are significantly lower than a seasonally adjusted comparison to last year. Overall, this loss represents a 4.5 percent reduction in sales from the same time last year. However, when we break it down by product category, sales of our non-edible products have seen a modest but steady increase, while sales of edibles account for the drop-off and we need to halt the decline.

With hard facts and figures, as well as a breakdown that pinpoints specific strengths and weaknesses, the team can begin providing a more thorough analysis that would itself suggest solutions.

11.1.2.2: Analyze the Problem

Now the group analyzes the problem by figuring out its root causes so that the solution can address those rather than mere effects. Why do non-edible products continue selling well? What is it about the edibles that is turning customers off? The problem is complex and requires more than one area of expertise, so let's meet our problem solvers at Fan Favourites.

Kevin is responsible for customer resource management. He is involved with the customer from the point of initial contact through purchase and delivery. Most of the interface is automated in the form of an online shopping-cart model, where photographs and product descriptions are accompanied by “Add to Cart” buttons. He is available during normal business hours for live chat and voice chat if needed, and customers are invited to request additional information. Most Fan Favourites customers don't access this service, but Kevin is nonetheless quite busy handling returns and complaints. Because he believes that superior service retains customers while attracting new ones, he is always interested in better ways to serve the customer. Looking at edibles and non-edibles, he'll study the cycle of customer service and see if there are any common points—from the main webpage, through the catalog, to the checkout process, and on to returns where customers abandon the sale. He has existing customer feedback loops with end-of-sale surveys, but most customers decline to take the survey and there is currently no incentive to participate.

Mariah is responsible for products and purchasing. She wants to offer the best products at the lowest price and to offer new, unusual, rare, or exotic products. She regularly adds these products to the Fan Favourites catalog and culls underperformers. Right now she has the data on every product and its sales history, but representing that history is a challenge. She analyzes current sales data and produces a report that specifically identifies how each product—edible and non-edible—has and is performing. She wants to highlight “winners” and “losers” but also recognizes that today's duds may be tomorrow's hotcakes. It's hard to predict constantly changing tastes and preferences, but that's part of her job. It's both an art and a science. She must have an eye for what will catch on tomorrow while continuing to provide what is hot today.

Suri is responsible for data management at Fan Favourites. She gathers, analyzes, and presents information gathered from the supply chain, sales, and marketing. She works with vendors to ensure product availability, makes sales predictions based on sales history, and assesses marketing campaign effectiveness. The problem-solving group members already have certain information on hand: they know that customer retention is one contributing factor. Attracting new customers is a constant goal, but they are aware of the well-known principle that it takes more effort to attract new customers than to keep existing ones. It's therefore important to ensure quality customer service for existing customers and encourage them to refer friends. The group needs to determine how to promote this favourable customer behaviour.

Another contributing factor seems to be that customers often abandon the shopping cart before completing a purchase, especially when purchasing edibles. The group members need to learn more about what's behind this. It's time to get methodical.

11.1.2.3: Establish Criteria

Establishing the criteria for a solution is the next step. At this point, information is coming in from diverse perspectives, and each group member has contributed information from their perspective, even though they may overlap at certain points.

Kevin: Customers who complete the post-sale survey indicate that they want to know (1) what is the estimated time of delivery, (2) why a specific item was not in stock and when it will be available, and (3) why their order sometimes arrives incomplete with some items back-ordered but with no notification at the point of sale.

He knows that a very small percentage of customers complete the post-sale survey and the results are far from scientific. He also notes that it appears the interface is not capable of cross-checking inventory to provide immediate information concerning back orders, so the customer “Adds to Cart” only to learn several days later that it was not in stock. This is worse for edible products because people tend to order them for special occasions like birthdays and anniversaries. We don’t really know this for sure, however, due to the low post-sale survey participation.

Mariah: Four edible products frequently sell out. So far, we haven’t been able to boost the appeal of other edibles so that people would order them as alternatives when sales leaders are unavailable. We also have several rare, exotic products that are slow movers. They have potential, but are currently underperformers.

Suri: We know from a postal code analysis that most customers are from a few specific geographic areas associated with above-average incomes. We have very few credit cards declined, and the average sale is over \$100. Shipping costs average 8% of the total sales cost. We don’t have sufficient information to produce a customer profile. There’s no specific point in the purchase process where cart abandonment tends to happen; it happens fairly uniformly at all steps.

11.1.2.4: Consider Possible Solutions to the Problem

The group listens to each other and now brainstorms ways to address the challenges they have analyzed while focusing resources on those solutions that are more likely to produce results.

Kevin: Is it possible for our IT programmers to create a cross-index feature linking the product desired with a report of how many are in stock? I’d like the customer to know right away whether it is in stock or how long they may have to wait. Another idea is to add incentives to the purchase cycle that won’t negatively impact overall profit. I’m thinking a small-volume discount on multiple items, or perhaps free shipping over a specific dollar amount like many online retailers such as Amazon.ca or Well.ca do.

Mariah: I recommend holding a focus group where customers can sample our edible products and tell us what they like best and why. When the best sellers are sold out, could we offer a discount on related products to provide an instant alternative? We might also cull the underperforming products with a liquidation sale to generate interest.

Suri: If we want to know more about our customers, we need to give them an incentive to complete the post-sale survey. How about a 5%-off coupon code for the next purchase to get them to return and to help us better identify our customer base? We may also want to build in a customer referral rewards program, but it all takes better data in to get results out. We should also explore the supply side of the business by getting a more reliable supply of the leading products and trying to get discounts that are more advantageous from our suppliers, especially in the edible category.

11.1.2.5: Decide on a Solution

Kevin, Mariah, and Suri may want to implement all the solution strategies, but they do not have the resources to do them all. They'll complete a cost-benefit analysis, which ranks each solution according to its probable impact, as shown in Table 10.3.3.5 below.

Table 11.1.2.5: Sample Cost-benefit Analysis

Source	Proposed Solution	Cost	Benefit	Comment
Kevin	Integrate cross-index feature	High	High	Many competitors already do this
Kevin	Volume discount	Low	Medium	May increase sales slightly
Kevin	Free shipping	Low	Low	Downside: makes customers aware of shipping costs if order doesn't qualify for free shipping
Mariah	Hold a focus group to taste edible products	High	Medium	Hard to select participants representative of customer base
Mariah	Search for alternatives to high-performing products	Medium	Medium	Can't be certain which products customers will like best
Mariah	Liquidate underperformers	Low	Low	Might make a "bargain basement" impression inconsistent with brand
Suri	Incentive for post-sale survey completion	Low	Medium	Ensure the incentive process is user-friendly
Suri	Incentive for customer referrals	Low	Medium	Customers may feel uncomfortable being put in a marketing role
Suri	Find a more reliable supply of top-selling edibles	Medium	High	Already know customers want these products
Suri	Negotiate better discounts from vendors	Low	High	A win-win if it doesn't alienate best vendors

Now that the options have been presented with their costs and benefits, deciding which courses of action are likely to yield the best outcomes is much easier. The analysis helps the team see beyond the immediate cost of implementing a given solution. For example, Kevin's suggestion of offering free shipping won't cost Fan Favourites much money, but it also may not pay off in customer goodwill. Even though Mariah's suggestion of having a focus group might sound like a good idea, it'll be expensive and its benefits questionable.

The analysis indicates that Kevin's best suggestion is to integrate the cross-index feature in the ordering process so that customers can know immediately whether an item is in stock or on back order. Meanwhile, Mariah suggests that searching for alternative products is probably the most likely to benefit Fan Favourites, while Suri's two supply-side suggestions are likely to result in positive outcomes.

11.1.2.6: Implement the Solution

Kevin is faced with the challenge of designing the computer interface without incurring unacceptable costs. He strongly believes that the interface will pay for itself within the first year—or, to put it more bluntly, that Fan Favourites' declining sales will get worse if the website doesn't have this feature soon. He asks to meet with top management to get budget approval and secures their agreement on one condition: he must negotiate a compensation schedule with the IT consultants that includes delayed compensation in the form of bonuses after the feature has been up and running successfully for six months.

Mariah knows that searching for alternative products is a never-ending process, but it takes time and the company needs results. She decides to invest time evaluating products that competing companies currently offer, especially in the edible category. She theorizes that customers who find their desired items sold out on the Fan Favourites website may have been buying alternative products elsewhere instead of choosing an alternative from Fan Favourites' product lines.

Suri decides to approach the vendors of the four most frequently sold-out products and ask point blank, "What would it take to get you to produce these items more reliably in greater quantities?" By opening the channel of communication with these vendors, she motivates them to make modifications that will improve the reliability and quantity. She also approaches the vendors of the less popular products with a request for better discounts in return for their cooperation in developing and test-marketing new products.

11.1.2.7: Follow Up on the Solution

Kevin: After several beta tests, the cross-index feature was implemented and has been in place for thirty days. Now customers see either "in stock" or "available [mo/da/yr]" in the shopping cart. As expected, Kevin sees a decrease in the number of chat and phone inquiries of the "Will this item arrive before my wife's birthday?" type. However, he also sees an increase in inquiries asking, "Why isn't this item in stock?" It is difficult to tell whether customer satisfaction is higher overall.

Mariah: In exploring the merchandise available from competing retailers, she got several ideas for modifying Fan Favourites' product line to offer more flavours and other variations on popular edibles. Working with vendors, she found that these modifications cost very little. Within the first thirty days of adding these items to the product line, sales are up. Mariah believes these additions also serve to enhance the Fan Favourites brand identity, but she has no data to back this up.

Suri: So far, the vendors supplying the four top-selling edibles have fulfilled their promise of increasing quantity and reliability. Three of the four items have still sold out, however, raising the question of whether Fan Favourites needs to bring in one or more additional vendors to produce these items. Of the vendors Fan Favourites asked to negotiate better discounts, some refused and two were “stolen” by a competing retailer so that they no longer deal with Fan Favourites. In addition, one of the vendors that agreed to give a better discount was unexpectedly forced to cease operations for several weeks because of a fire.

This scenario allows us to see that the problem may have several dimensions as well as solutions, but resources can be limited and not every solution is successful. Even though the problem is not completely resolved immediately, the team made some measurable progress towards their goal. Even learning what doesn’t work gives them valuable intel when they go back to the drawing board to refine past attempts and hatch all new solution possibilities. Altogether, the methodical approach serves as a useful guide through the problem-solving process that will eventually lead to success (*Business Communication for Success*, 2015, 19.3).

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11.1.3: Leading Teams

As we saw in our discussion of team roles (see §10.3.1 above), teams depend on excellent leadership to guide it in the right direction and keep them on track. Without leadership, team members may act as if it’s an everyone-for-themselves game. It would be as if, instead of pulling in a straight line during a tug-o-war, everyone on your team pulled the rope in whatever direction suited them best, including opposite the direction you should be pulling. Good leadership gets everyone pulling in the same direction.

The further you go in your profession and the more you move up in terms of responsibility and pay scale, the more likely it is you’ll occupy a leadership role. This may be far from now or perhaps you have the drive, personality, and people-managing skills for such a role already. Either way, you must consider the leadership role you’ll occupy as one whose success depends largely on communication skills.

11.1.3.1: Paths to Leadership

Whether or not there is a natural born leader who comes equipped with a combination of talents and traits that enable them to direct others has been the subject of debate since time immemorial. Today research in psychology tells us that someone with presence of mind, innate intelligence, and an engaging personality doesn’t necessarily destine them for a leadership role. The skill set that makes for an effective leader can be learned just like any other. On the other hand, some who think that they’re meant to be leaders lack the leadership skill set and manage only to do a great deal of damage whenever they’re trusted in such roles. History is full of examples of men who assumed leadership of vast empires merely by accident of birth and, through misgovernment, were responsible for the deaths of millions and met tragic ends themselves.

Leaders take on the role because they are appointed, elected, or emerge into the role through attrition (i.e., when others vacate it, leaving a vacuum that needs filling). Team members play an important role in this process. A **democratic leader** is elected or chosen by the group, but may also face serious challenges. If individual group members or constituent groups feel neglected or ignored, they may assert that the democratic leader doesn't represent their interests after all. The democratic leader involves the group in the decision-making process, and ensures group ownership of the resulting decisions and actions as a result. This process is characterized by open and free discussions, and the democratic leader acknowledges this diversity of opinion.

An **appointed leader**, on the other hand, is designated by an authority to serve in that capacity irrespective of the thoughts or wishes of the group. This could go well or not. Such a leader may accomplish all the designated tasks, perhaps by any means necessary, but a group that refuses to accept their role as leader is going to be a dysfunctional one. The work environment is likely to be a toxic one under such leadership if the appointment is based on cronyism or nepotism (meaning that they became leader only because of who they know or are related to). Such a group will be pulling their tug-o-war rope in divergent directions until the unpopular leader leaves or is forced out (either from above or below) and a new leader properly endorsed by the group emerges into that office.

An **emergent leader** is thus different from the first two paths by growing into the role often out of necessity. They may enter into the role merely because they know more than anyone around what needs to be done. When the appointed leader may have leadership skills but know little about the area they manage, group members will naturally look to the most senior experience team member for guidance. If the democratic leader fails to bring the group together, or does not represent the whole group, subgroups may form, each with an informal leader serving as spokesperson. In this way, the emergent leader is favoured in any true meritocracy—i.e., where skill, talent, and experience trump other considerations.

11.1.3.2: Types of Leaders

We can see types of leaders in action and draw on common experience for examples. For good reason, the heart surgeon does not involve everyone democratically in the decision-making process during surgery, is typically appointed to the role through earned degrees and experience, and resembles a military sergeant more than a politician. The **autocratic leader** is self-directed and often establishes norms and conduct for the group. We can see that this is quite advantageous in certain situations such as open-heart surgery or during a military exercise, but it certainly doesn't apply in all workplace situations.

Opposite the autocrat is the “live and let live” **laissez-faire leader**. In a professional setting, such as a college, instructors may bristle at the thought of an autocratic leader telling them what to do. They know how to do their job, having earned their role through time, effort, and experience. A wise laissez-faire leader recognizes this aspect of working with professionals and may choose to focus efforts on providing the instructors with the tools they need to make a positive impact.

Imagine that you're a television director and have a vision for what the successful pilot program should look

like. The script is set, the lighting correct, and the cameras are correctly positioned. You may tell people what to do and where to stand, but you remember that your job is to facilitate the overall process. You work with talented, creative people who know what works best for their role on camera. If you micromanage your actors, they may perform in ways that are not creative and that will not draw audiences. If you let them run wild through improvisation, the program may not go well at all. The challenge of the laissez-faire leader is balancing the need for control with the need for space.

Many types of leaders fall between these poles. Thomas Harris and John Sherblom (1999) specifically note three leadership styles that characterize the modern business or organization, and reflect our modern economy. We are not born leaders but may emerge into these roles if the context or environment requires our skill set. A **leader-as-technician** role often occurs when we have skills that others do not. If you excel at all aspects of residential construction from having done those jobs yourself, your extensive knowledge and learned ability to coordinate other skilled labourers to complete the many sub-tasks that complete a project on time and on budget are prized and sought-after skills. Technical skills, from Internet technology to facilities maintenance, may experience moments where their particular area of knowledge is required to solve a problem. Their leadership will be in demand.

The **leader-as-conductor** involves a central role of bringing people together for a common goal. In the common analogy, a conductor leads an orchestra and integrates the specialized skills and sounds of the various components the musical group comprises. In the same way, a leader who conducts may set a vision, create benchmarks, and collaborate with a group as they interpret a set script. Whether it is a beautiful movement in music or a group of teams that comes together to address a common challenge, the leader-as-conductor keeps the time and tempo of the group without necessarily getting their hands dirty like the lead contractor in the previous example.

Coaches are often discussed in business-related books as models of leadership for good reason. A **leader-as-coach** combines many of the talents and skills we've discussed here, serving as a teacher, motivator, and keeper of the goals of the group. A coach may be autocratic at times, give pointed direction without input from the group, and stand on the sidelines while the players do what they've trained hard to do. The coach may look out for the group and defend it against bad calls, and may motivate players with words of encouragement. We can recognize some of the behaviours of coaches, but what specific traits have a positive influence on the group? Thomas Peters and Nancy Austin identify five important traits that produce results:

1. Orientation and education
2. Nurturing and encouragement
3. Assessment and correction
4. Listening and counselling
5. Establishing group emphasis

Coaches are teachers, motivators, and keepers of the goals of the group. When team members forget that there

is no “I” in the word “team,” coaches redirect the individuals’ attention and energy to the overall goals of the group. They conduct the group with a sense of timing and tempo, and at times, relax to let members demonstrate their talents. Through their listening skills and counselling, they come to know each member as an individual, but keep the team focus for all to see. They set an example.

Coaches are human, however, and by definition are not perfect. They can and do prefer some players over others and can display less than professional sideline behaviour when they don’t agree with the referee, but the style of leadership is worthy of your consideration in its multidisciplinary approach. Coaches use more than one style of leadership and adapt to the context and environment. A skilled business communicator will recognize the merits of being an adaptable leader (*Business Communication for Success*, 2015, 19.5).

Whatever the type of leader, much of their effectiveness comes down to how they communicate their expectations and direction. Some leaders manage by stick and others by carrot—i.e., some prefer to instill fear and command respect (whether earned or not) to get compliance by coercion, whereas others inspire employees to do their best work by a system of rewards including praise (see §4.5.2.5.2 and §8.1.2.1 above). The former usually leads to a toxic work environment where no one does their best work because the conditions are miserable. Someone who doesn’t look forward to going to work because of the psychological turmoil is not going to focus on accomplishing team goals. An employee who admires and gets along with both their manager and co-workers, on the other hand is productive employee motivated to doing good work in pursuit of even more praise and success.

11.1.3.3: Toxic Leadership

We’ve focused for the most part on effective leadership, but what happens if you find yourself working under a horrible boss? It happens. Plenty of people assume positions of authority who are effective in some areas of management (e.g., they are shrewd businesspeople and good with money) but aren’t so good with people, or vice versa. There are even managers who are bad at everything and it’s only a matter of time before they are fired or ruin the operation with incompetence, or they may continue to be propped up by cronyism, nepotism, or some other kind of corruption. Some bosses are even offensive to the point of committing harassment along a spectrum of misbehaviour ranging from inappropriate jokes or rude remarks to outright predatory sexual harassment or assault and violence. Whatever the case, nothing good comes of toxic leadership. Employees just aren’t productive when fearing abuse from their managers or worrying about the their leadership running the operation into the ground.

If the mismanagement is severe—especially if it is physically or emotionally abusive—the best way of dealing with the situation is to leave it. A boss who makes you feel unsafe may suffer from a personality disorder that makes them dangerous, and there’s no fixing that. If you’re in immediate danger, of course you must leave immediately. From there, figure out your options. For starters, familiarize yourself with the Occupational Health and Safety Act (OHSA, 1990) via a guide such as *Workplace Violence and Harassment: Understanding the Law* (Ontario Ministry of Labour, 2016). Know that all workplaces are required to have procedures in place

for reporting incidents perpetrated by a manager or supervisor to a neutral authority without compromising your employment (*OHSA*, 1990, sec. 32.0.6. [2] [b]). You could also make a *Human Rights Code* (1990) complaint (called an application) to the Human Rights Tribunal of Ontario following advice from the Human Rights Legal Support Centre.

If you're not in immediate danger but the situation is too toxic to continue, you must leave as soon as possible. A major red flag is if most of your co-workers agree that your boss is terrible. If leaving is easier said than done because you live paycheck to paycheck and can't afford to be out of work even for a short while, a well-devised exit strategy is in order. Building a lifeboat in the form of lining up your next stable employment is the best you can do, though it may take time and you may have to do it without a reference from your current employer.

If the toxicity is relatively minor, perhaps the result of some nasty things said here and bad moves there, using internal procedures required of employers by law to address managerial misconduct is the most ethical course of action. It is ultimately the employer's responsibility to ensure a non-toxic work environment, and if that means disciplinary action going up the chain of command, then it's worth it to have people doing their best work without hating the people they're working for. Any *OHSA*-compliant workplace will have such reporting procedures in place, including provisions to prevent employment-compromising retaliation. With pressure from above and below in the workplace hierarchy, some offending managers may improve their behaviour knowing their job depends on it.

Of course, you must also be good about picking your battles if your leadership isn't perfect but not horrible either. Managers are under plenty of pressure—especially middle managers who feel it from above and below—and can easily make mistakes such as being gruff when a softer approach would be more appropriate. If you have the type of boss who only talks to you about the one thing you did wrong in a day while saying nothing about the hundred things you did right, this may be a sign of someone who lacks good people skills. It may also be that they're extremely busy and have time only for quality assurance rather than boosting morale. If your manager isn't a complete monster, exercising some understanding about the reasons why will make your life and work more tolerable.

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11.1.4: Constructive Criticism

Performing work of a high quality is vital not only to your success in any profession but to the success of your team and company. How do you know if the quality of your work is meeting client, manager, co-worker, and other stakeholder expectations? **Feedback**. Whether this comes as a formal evaluation or informal comments, they'll tell you whether you're doing a great job, merely a good one, satisfactory, or a poor one that needs improving because their success depends on the quality of work you do. Poor leadership will merely point out what you're doing wrong, which is **negative feedback** or mere criticism, and tell you to fix it without being

much help. Good leadership may start with negative feedback and then tell you what you must do to improve. Inspiring leadership skips the negative criticism altogether and surrounds the constructive criticism with praise to effectively boost morale and motivate the worker to seek more praise. This is leading by carrot rather than stick.

Constructive criticism differs from mere negative criticism in that it is focused on improvement with clear, specific instructions for what exactly the receiver must do to meet expectations. If you merely wanted to criticize a report, for instance, you could say it's terribly written and demand that it be fixed, leaving the writer to figure it out. Of course, if they don't know what the expectations are, attempts at fixing it may result in yet more disappointment.

If you were offering constructive criticism, however, you would give the writer specific direction on how to improve. You might encourage them to revise and proofread it, perhaps taking advantage of MS Word's spell checker and grammar checker, as well as perhaps some specific writing-guide review for recurring errors and the help of a second pair of eyes (see Ch. 5 on editing in the writing process). You may even offer to help yourself by going through a part of the report, pointing out how to fix certain errors, and thus guiding the writer to correct similar errors throughout. Of course, you can lead a horse to water but you can't make them drink; if all of these efforts fail to motivate the employee to do better, switching to a more strict, threat-based style of leadership may get the necessary results. Most people don't like being criticized, and yet sometimes negative feedback is necessary if being too nice doesn't work. For best results at the outset, however, always start with well-organized constructive criticism.

11.1.4.1: Receiving Constructive Criticism

No one's perfect, not even you, so your professional success depends on people telling you how to improve your performance. When you receive well-phrased constructive criticism, accept it in good faith as a gift because that's what it is. If a close friend or colleague nicely tells you to pick out the broccoli between your teeth after lunching with them, they're doing you the favour of telling you what you don't know but need to in order to be successful or at least avoid failure. Your enemies, on the other hand, would say nothing, letting you go about your day embarrassing yourself in the hopes that it will contribute to your failure. Constructive criticism is an act of benevolence or mercy meant to improve not only your performance but also that of the team and company as a whole. Done well, constructive criticism is a quality assurance task rather than a personal attack. Be grateful and say *thank you* when someone is nice enough to look out for your best interests that way.

Receiving constructive criticism gracefully may mean stifling your defensive reflex. Important skills not only in the workplace but in basic communication include being a good listener and being able to take direction. Employees who can't take direction well soon find themselves out of job because it puts them at odds with the goals of the team and company. Good listening means stifling the defensive reflex in your head before it gets out and has you rudely interrupting the speaker. Even if you begin mounting defenses in your head, you're not effectively listening to the constructive criticism.

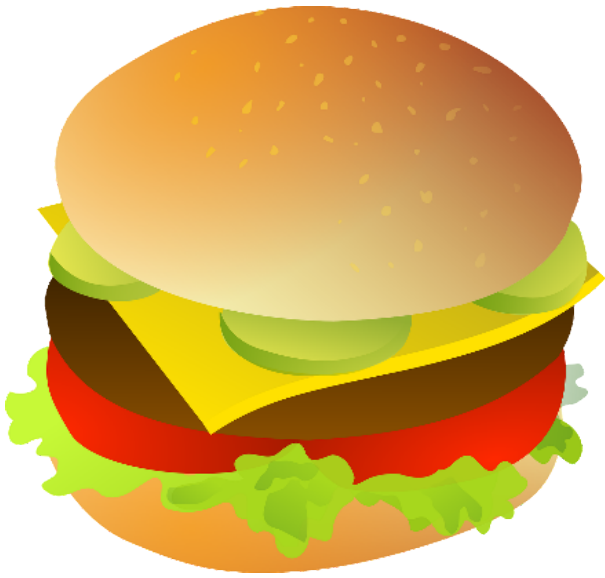
Receiving constructive criticism in a way that assures the speaker that you understand involves completing the communication process discussed in §1.3 above. You can indicate that you're listening first with your nonverbals:

- Maintaining **eye contact** shows that you're paying close attention to the speaker's words and nonverbal inflections
- **Nodding** your head shows that you're processing and understanding the information coming in, as well as agreeing
- **Taking notes** shows that you're committing to the information by reviewing it later

Once you understand the constructive criticism, paraphrase it aloud to confirm your understanding. "So you're basically saying that I should be doing X instead of Y, right?" If the speaker confirms your understanding, follow up by explaining how you're going to implement the advice to assure them that their efforts in speaking to you won't be in vain. Apologizing may even be necessary if you were clearly in the wrong (see §8.2.2.2 above for more on apologizing).

Of course, if the constructive criticism isn't so constructive—if it's mere criticism (a "poop sandwich" without bread, to use the phrasing in §10.4.4.1 below), you would be right to ask for more help and specific direction. If the criticism is just plain wrong, perhaps because your manager is somehow biased or mistaken in thinking you're at fault when really there are other culprits they are unaware of, respectfully correcting them is the right thing to do. You don't want management to get the wrong impression about you in case that means you'll be passed up for promotion down the road. When disagreeing, focus on the faulty points rather than on your feelings even if you've taken the feedback as a personal insult. Always maintain professionalism throughout such exchanges.

11.1.4.2: Giving “Poop Sandwich” Constructive Criticism



One of the most important functions of a supervisor or manager is to get the best work out of the people working under them. When those employees' work leaves room for improvement, it's the leader's job to convince them that they can do better with a clear explanation of how. As we saw in §8.1.2.1 above, clarity and precision are necessary here because the quality of improvement will only be as good as the quality of instruction. As miscommunication, vague and misleading instruction will lead to little-to-no improvement or even more damage from people acting on misunderstandings caused by poor direction. Not only must the content of constructive criticism be of a high quality itself, but its packaging must be such that it properly motivates the receiver.

An effective way of delivering constructive criticism is called the “**poop sandwich**,” usually said with a more vulgar alternative to “poop.” Like sugar-coating bitter medicine, the idea here is to make the receiver feel good about themselves so that they're in a receptive frame of mind for hearing, processing, and remembering the constructive criticism. If the constructive criticism (the poop) is focused on improvement and the receiver associates it with the praise that comes before and after (the slices of bread), the purely positive phrasing motivates them to actually improve. Like many other message types we've seen (e.g., in §4.1 and §6.1.5 – .7), this one's organization divides into three parts as shown in Table 10.4.4.1 below.

Table 11.1.4.2: Poop Sandwich Feedback

Feedback	Example
1. Sincere, specific praise	Your report really impressed me with its organization and visually appealing presentation of your findings. It's almost perfect.
2. Constructive criticism	If there's anything that you can improve before you send it on to the head office, it's the writing. Use MS Word's spellchecker and grammar checker, which will catch most of the errors. Perhaps you could also get Marieke to check it out because she's got an eagle eye for that sort of thing. The cleaner the writing is, the more the execs will see it as a credible piece worth considering.
3. Sincere, specific praise	Otherwise, the report is really great. The abstract is right on point, and the evidence you've pulled together makes a really convincing case for investing in blockchain. I totally buy your conclusion that it'll be the future of financial infrastructure.

Of course, this style of feedback may develop a bad reputation if done poorly, such as giving vague, weak praise (called “damning with faint praise”) when more specific, stronger praise is possible. If done well, however, the poop sandwich tends to make those receiving it feel good about themselves even as they're motivated to do better.

Poop sandwich feedback can be challenging, however, if the receiver hasn't done enough praiseworthy work to get two pieces of bread together. In such cases, you can always reach for something to flatter them with (“I like your hair today, but . . .”) in an attempt to put them at ease, then carefully word the constructive criticism so that it doesn't put the receiver down. After all, the entire point of the poop sandwich is to make the constructive criticism more palatable by keeping it positive with feel-good sentiment.

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11.1.5: Communicating Bad News in Person

We've discussed delivering bad news in writing (see §8.3 above), but what about in person? The richness of the face-to-face channel makes it ideal for communicating bad news—more so than in writing. As far as tasks go, however, few people enjoy either giving or receiving bad news this way. Since most people dislike conflict, it's understandable that they'd prefer to use electronic channels to deliver bad news safely out of range from the uncomfortable sights of its distressing effects. Who enjoys making people sad or angry, making tears run down faces or provoking retaliatory confrontation? Besides being the right thing to do from an ethical standpoint, delivering negative news in person can be more effective than not and even necessary in many workplace situations.

The first step involves a clear goal. Stephen Covey (1989) recommends beginning with the end in mind. Do you want your negative news to inform or bring about change? If so, what kind of change and to what degree?

A clear conceptualization of the goal allows you to anticipate the possible responses, plan ahead, and get your emotional “house” in order.

Your emotional response to the news and the audience, whether it’s one person or the whole company, will set the tone for the entire interaction. You may feel frustrated, angry, or hurt, but the display of these emotions is often more likely to make the problem worse than to help solve it. Because of mirroring, emotions can be contagious, and people will respond in kind to the emotional tone of the speaker.

If your response involves only one other person, a private, personal meeting is the best option, but it may be unavailable. People often work and contribute to projects from a distance via the internet and may only know each other via email, phone, or web conferencing (e.g., Skype). A personal meeting may be impractical or impossible. How then does one deliver negative news in person? By the best option available to both parties. Written feedback may be an option via email, but it takes time to prepare, send, receive, process, and respond—and the written word has its disadvantages. Miscommunication and misinterpretation can easily occur in the absence of nonverbal cues and the constructive feedback for checking meanings and clarifying perceptions afforded by real-time face-to-face conversation.

A phone call allows both parties to hear each other’s voices, including the words, the inflection, and the emotional elements of conversation. It allows both speakers to check for understanding, ask questions for clarification, and elaborate on points immediately in a reciprocal back-and-forth. Most phone networks offer crystal clear long-distance calling no matter where users are in the world. Voice over internet protocol (VoIP) allows you to do the same with relatively little cost.

Despite its distinct advantages, telephone communication lacks part of the nonverbal spectrum available to speakers in a live setting. On the phone, proximity is a function of response time rather than physical closeness. Time is also synchronous, though the phone crosses time zones and changes the context as one party may have just arrived at work while the other party is leaving for lunch a few time zones away. Body language gets lost in the exchange as well, although many of us continue to make hand gestures on the phone even when our conversational partners cannot see us. The phone allows for a richer communication experience than written communication but can’t quite convey the full range of information needed for delivering bad news. Just as a telephone interview may be used for screening purposes while a live interview is reserved for the final candidates, the live setting is often considered the best option for delivering bad news. If possible, you can use the phone to arrange a face-to-face meeting where you’ll deliver the bad news in person.

If you need to share the bad-news message with a larger audience, you may need to speak to a group or might even have to make a public presentation or speech. For high-profile bad news, for instance, a press conference enables a feedback loop with a question and answer session following the bad-news announcement. From meeting work colleagues in the hallway to a live, onstage audience under camera lights and a barrage of questions from reporters, the personal delivery of bad news is a challenging task that requires the richest channel (*Business Communication for Success*, 2015, 17.1).

Key Takeaway



Almost all jobs require advanced teamwork skills, which involve being effective in performing a particular role (e.g., leader) in a working group, contributing to group problem-solving, and both giving and receiving constructive criticism.

Exercises



1. Think of a group you belong to and identify some of the roles played by its members. Identify your role (give it a label, perhaps based on those given in §10.3.1) and explain how it enriches the group.
2. Consider past group work you've done in high school or even recently in college and identify a particular problem you had to overcome to guarantee the group's success. Did the group as a whole contribute to its solution, or did an individual member have to step up and pull through? Describe your problem-solving procedure. Was it successful immediately or did it require fine-tuning along the way?
3. Identify a problem that can only be solved with teamwork in the profession you'll enter into upon graduating. Describe the problem-solving process using the seven-step procedure narrated in §10.3.2.
4. Think of a leader you admire and respect, someone who had or has authority of you. How did they become a leader? By appointment, democratic selection, or emergence? How would you characterize their leadership style? Are they autocratic or laissez-faire? Are they like a technician, conductor, or a coach? Do they use the carrot or the stick to get action from the people they have authority over?
5. Roleplay with a classmate the following scenario: You're a mid-level manager and are concerned about an employee arriving 15-20 minutes late every day, although sometimes it's around 30-40 minutes. The employee leaves at the same time as everyone else at the end of the day, so that

missing work time isn't made up. What you don't know (but will find out from talking with the employee) is that they must drop their child off at elementary school shortly before 8am, battle gridlock highway traffic on the way to work (hence the lateness), then leave at a certain time to pick their child up from after-school daycare (hence not being able to stay later). What you do know is that talking with the employee in private is the right way to handle this and that the executive director above you considers it your responsibility to have everyone arriving on time and being paid for their hours as stipulated in their contracts; the director isn't afraid of firing someone for such a breach of contract, so you have the authority to threaten the employee with that consequence if you feel that it's necessary. The fact that this employee is being paid for working fewer hours than stipulated in the contract will be a strike against you unless you either get them back on track or fire them if you can't work their full hours. Be creative in discussing an amicable solution with the employee that satisfies everyone involved. Switch between being both the manager and the employee in your roleplay.

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11.2: CONFLICT RESOLUTION STRATEGIES

Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
6. Rank several types of response to conflict in the workplace in order of most appropriate to least.
7. Explain a collaborative approach to resolving workplace conflict.

A behavioural question job applicants often hear during a job interview is how they would handle a conflict situation with a customer or co-worker. Would you know how to answer it? It's a good question because conflict certainly happens in the workplace. The potential for conflict exists anywhere two or more motivated people interact. Most people are conflict-averse, but some have no problem aggressively defending their interests, and some even seem to seek out conflict just for the thrill of it. Even though we're well beyond the playground politics, adults can still be bullies in the workplace. Even when two otherwise good people lose themselves in the heat of an argument, knowing how to deal with such situations is a vital workplace skill.

First, it's worth knowing what conflict is, why it arises, and what it is *not*. Conflict is the physical or psychological struggle associated with the perception of opposing or incompatible goals, desires, demands, wants, or needs (McLean, 2005). Conflict is universal and typically arises with opposing interests, scarce resources, or interference, but it doesn't necessarily mean the relationship between parties in conflict is fundamentally broken. All relationships progress through times of conflict and collaboration. How we manage these moments either reinforces or destroys the relationship. Rather than viewing conflict from an entirely negative frame of reference, we should view it as an opportunity for clarification, learning, growth, and even reinforcement of the relationship.

Conflict arises everywhere communication occurs. Effective communicators can predict, anticipate, and formulate strategies to address conflict in order to successfully resolve it. How you choose to approach conflict influences its resolution. Joseph DeVito (2003) offers us several conflict management strategies that we have adapted and expanded for our use below. Let's examine these various responses to conflict generally from best to worst.

- 11.2.1: Using the GRIT Method
- 11.2.2: Managing Your Emotions
- 11.2.3: Empathizing
- 11.2.4: Being Supportive vs. Defensive
- 11.2.5: Face-saving vs. Face-detracting
- 11.2.6: Backpacking
- 11.2.7: Avoiding
- 11.2.8: Escalating

11.2.1: Using the GRIT Method

When conflict is serious enough that it causes a rift within the workplace culture, the kind that pollutes the work atmosphere and threatens irreparable damage, a methodical, collaborative approach conflict resolution can help lead to an amicable solution. Standard procedure in negotiations is a method called GRIT that was developed by Charles E. Osgood (1962) at the height of the Cold War. In a situation where two opposing sides are deadlocked. GRIT stands for **Graduated Reciprocation in Tension-reduction**, sometimes watered down into Gradual Reduction in Tension. It involves one side initiating a breakthrough in the form of a concession or compromise on one of its demands. The norm of reciprocity obligates the other side to return the favour with a concession of its own, giving up one of its demands (see how the norm of reciprocity is used as a sales technique in §8.4.2.1 above). Both sides build trust by reciprocal compromises back and forth till they reach an amicable solution. Though Osgood's intention was to thaw Cold War relations between superpowers, GRIT has proven useful in other international peace processes (e.g., between Israel and Egypt in 1977) and even in minor workplace squabbles (Psychology, 2016).

Let's say you find yourself getting between two conflict parties at your job; on one side is a trusted co-worker, Dave, and the other is the manager, Karin, whom you like very much. They don't see eye-to-eye on the way a major aspect of the operation is set up, and it's caused a rift that is starting to draw other employees in to take sides. Team Dave doesn't miss opportunities to take pot-shots at anyone on Team Karin for being management lackies, and Team Karin has been dismissive of Team Dave's concerns and it's members have been threatening to get Team Dave members fired. It doesn't look like this will end well. Your sympathies go to both sides, so you propose to mediate between them. Applying GRIT in this situation would look like the following:

1. Get both sides to **agree to talk formally** with one another in the meeting room with the goal of resolving the conflict. Reasonable human beings will recognize that the toxic environment is hindering productivity and is bad for business. Team Dave knows that it will be a hassle having to look for and secure new jobs, and Team Karin knows it'll likewise be a lot of work to let everyone go and re-hire half the operation, which will take time and will meanwhile slow operations down even further. No one

want this despite everyone taking sides and digging into their chosen positions till now. The willingness to participate in a conflict resolution process requires that both parties show a concern for rescuing the relationship.

2. After sitting down to talk to one another, actually **listen to one another's concerns**. Much of conflict in the workplace happens when two sides don't understand each other's thinking. Sharing each other's thoughts in a mature and controlled way will dispel some of the misunderstandings that led to the conflict. One side gets a certain amount of time to state their case uninterrupted. The other gets the same. Then they take turns responding to each other's points.
3. **Establish common ground**. When two sides are locked in a dispute, they usually share more in common than they realize. After discussing their differences, movement forward toward a resolution must involve establishing points of agreement. If both parties agree that the success of their operation is in their best interests, then you can start with such common goals and then work your way down to more specific points of agreement. These may begin to suggest solutions.
4. **Discuss innovative solutions** to the conflict. With everyone in the room representing their various interests within the organization and listening to one another's concerns, truly cooperative collaboration can begin in identifying solutions to operational problems.
5. Take turns **exchanging concessions GRIT-style**. After establishing common ground and considering pathways towards operational solutions, address the lingering differences by getting both sides to prioritize them and offer up the lowest-priority demands as a sacrifice to the deal you want them to strike. If the other side like this, the principle of reciprocity compels them to drop their lowest priority demand as well. Then both sides go back and forth like this with each condition until they reach an agreement.

The agreement reached through such a collaborative process is a productive and reconciling one. Both sides can learn from each other and develop professionally from the process. Of course, if you find yourself on one side of such a conflict, you can certainly represent those interests while also playing the mediator.

If negotiations stall as both sides dig in and won't budge on contentious demands, however, calling in a mediator to conduct the negotiations and possibly an arbitrator to decide on what's fair for both parties is the best way forward. These may be found within an organization if it's staffed with people properly trained to mediate or arbitrate neutrally, or perhaps outside. Whatever the case, conflict resolution starts with you, so getting practice in following this method builds excellent group problem-solving skills. It also gives you something to talk about when you get that all-too-common question during job interviews, which must be answered with specific narrative details to be authentic and believable.

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11.2.2: Managing Your Emotions

Have you ever seen red, or perceived a situation through rage, anger, or frustration? Then you know that you cannot see or think clearly when you are experiencing strong emotions. There will be times in the work environment when emotions run high and you may regret the things you say in the heat of the moment—insults that will have a lasting impact because they will go into their target’s backpack. Your awareness of them can help you clear your mind and choose to wait until the moment has passed to tackle the challenge.

“Never speak or make decision in anger” is a common saying that holds true, but not all emotions involve fear, anger, or frustration. A job loss can be a sort of professional death for many, and the sense of loss can be profound. The loss of a colleague to a layoff while retaining your position can bring pain as well as relief, and a sense of survivor’s guilt. Emotions can be contagious in the workplace, and fear of the unknown can influence people to act in irrational ways. The wise workplace communicator recognizes when emotions are extreme in themselves or others, and choose to wait to communicate, problem-solve, or negotiate until after the dust has settled and the moment passed.

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11.2.3: Empathizing

When you see someone offended and “feel for them,” you know how they feel because you’ve experienced something like it would be feeling the same if you were in their situation now. That’s empathy. The ability to put yourself into someone else’s shoes is essential to emotional intelligence, which is itself vital to effective communication, especially in bad news situations (see §10.1.1.5 above for more on emotional intelligence).

Using empathy in conflict situations is helpful because it may keep you from saying things that would fan the flames of conflict because you would be hurt if someone said the same to you. Beyond what you say or don’t say, empathetic listening involves listening to both the literal and implied meanings within a message. For example, a co-worker might be feeling extremely distraught but express it indirectly by saying “I would just like to focus on the positives.” Listening empathetically means detecting the emotional pain motivating the desire for more uplifting news. With that understanding, you may be wise to change your approach from one that may have first been confrontational to one that is more sympathetic and helpful.

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11.2.4: Being Supportive vs. Defensive

Jack Gibb (1961) discussed defensive and supportive communication interactions as part of his analysis of

conflict management. Defensive communication is characterized by control, evaluation, and judgments, while supportive communication focuses on the points and not personalities. When we feel judged or criticized, our ability to listen can be diminished, and we may only hear the negative message. By choosing to focus on the message instead of the messenger, we keep the discussion supportive and professional.

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11.2.5: Face-Saving vs. Face-detracting

Conflict is targeted. When we say that someone is “thrown under the bus,” we use this violent image in reference to how language is weaponized to target individuals by name or role in a blame game. Such a **face-detracting** strategy compromises the respect, integrity, or credibility of the targeted person. On the other hand, **face-saving** strategies protect credibility and separate the message from messenger. For example, you might say that “sales were down this quarter,” without specifically noting who was responsible. Sales were simply down. However, if you ask, “How does the sales manager explain the decline in sales?” you have specifically connected an individual with the negative news. While we may want to specifically connect tasks and job responsibilities to individuals and departments, in terms of language each strategy has distinct results.

Face-detracting strategies often produce a defensive communication climate that inhibits listening and makes little room for collaboration. To save face, on the other hand, is to raise the issue while preserving a supportive climate, making room for constructive discussions and problem solving. By using a face-saving strategy to shift the emphasis from the individual to the issue, we avoid power struggles and petty personality politics (Donohue & Klot, 1992).

Face-saving strategies are common communicative strategies in collectivist cultures where the community’s well-being is promoted or valued above that of the individual. In Japan, for example, to confront someone directly is perceived as a supremely humiliating insult. In the United States, as well as Canada to some extent, a greater emphasis on individual performance leads to more face-detracting behaviour. If your goal is to solve a problem and preserve a working relationship, however, limit yourself to face-saving strategies in negative situations.

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11.2.6: Backpacking

George Bach and Peter Wyden discuss backpacking (or gunnysacking) as the imaginary luggage in which we carry unresolved grievances and grudges over time. If your organization has gone through a merger and your business has transformed, for instance, you may have endured conflicts in the transition. Holding onto the way things used to be can be like a hefty rock in your backpack and influence how you interpret your current context.

People may be aware of similar issues but might not know your history, and cannot see your backpack or its contents. For example, you may be frustrated and stressed out by the way your new manager handles things differently from your previous manager. All your new manager sees is the tension rather than how things were in the past. Bottling up those frustrations can cause your current relationships to suffer when they bubble up or explode when triggered. By addressing, or unpacking, the stones you carry by talking about them openly and respectfully, you can better assess the current situation with the current patterns and variables. We learn from experience, but can distinguish between old wounds and current challenges. Always try to focus your energies where they will make the most positive impact.

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11.2.7: Avoiding

Avoidance is a healthy or unhealthy response to conflict depending on its severity. Rising above trivial bickering is wise, whereas ignoring a serious conflict that threatens to pollute the work atmosphere and hinder productivity just contributes to the toxicity. In the latter case, you may choose to change the subject, leave the room, or not even enter the room in the first place, but the conflict will remain and resurface when you least expect it. Your reluctance to address the conflict directly is a normal response, and one that many cultures value. Direct confrontation is more common in individualistic cultures, whereas collectivist cultures tend to use more indirect strategies. Avoidance allows for more time to resolve the problem, but can also increase costs associated with problem in the first place. Your organization or business will have policies and protocols to follow regarding conflict and redress, but it is always wise to consider the position of your conversational partner or opponent and to give them, as well as yourself, time to explore alternatives (*Business Communication for Success*, 2015, 16.6).

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11.2.8: Escalating

Like avoiding, whether escalating conflict is an appropriate or inappropriate response depends on the importance of the issue and how what is done to escalate it. Escalating the conflict in the sense of over-reacting to a trivial issue, getting loud, using offensive language, drawing others into the fray, and even getting violent is of course the worst response to conflict. If it's a serious issue that needs resolving, however, and you escalate it in the sense that you bring it to the attention of a supervisor or manager because it falls within their realm of responsibility, you're doing the right thing. Whereas the latter response shows good judgment and will likely be favourably judged by management, the former response will more likely result in penalties or even termination from employment depending on the severity. Such reactions are seen by employers as a liability because they

suggest an inability to manage emotions (see §11.2.2 above) and the possibility of recurring damage to the company's reputation.

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Key Takeaway



Conflict is inevitable in any workplace with human interaction, so responding to it in ways that promote professionalism requires excellent communication skills and conflict-resolution strategies.

Exercises



1. Write a description of a situation you recall where you came into conflict with someone else. It may be something that happened years ago, or a current issue that just arose. Using the principles and strategies in this section, describe how the conflict was resolved, or could have been resolved.
2. Can you think of a time when a conflict led to a new opportunity, better understanding, or other positive result? If not, think of a past conflict and imagine a positive outcome. Write a two- to three-paragraph description of what happened, or what you imagine could happen.

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11.3: GROUP MEETINGS AND WEB CONFERENCING

Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
8. Explain the purpose and contents of the meeting agenda and minutes.
9. Demonstrate best practices in web conferencing for professional situations.

Although they can be boring, pointless, and futile exercises if poorly organized, professional group meetings are opportunities to exchange information and produce results when used appropriately in any business or organization. A combination of thoughtful preparation and cooperative execution makes all the difference. Though they typically take place in boardrooms where participants meet in person, web conferencing enables face-to-face meetings anywhere in the world. In this section we examine what makes for effective in-person and virtual meetings before, during, and after.

- 11.3.1: Meeting Preparation: The Agenda
- 11.3.2: Conducting the Meeting
- 11.3.3: Meeting Follow-up: The Minutes
- 11.3.4: Meeting-enhancing Technology

11.3.1: Meeting Preparation: The Agenda

A meeting, like a problem-solving group, needs a clear purpose statement. The specific goal for the specific meeting will clearly relate to the overall goal of the group or committee. Determining your purpose is central to an effective meeting, whereas getting together just for the sake of it is a party, not a meeting. Standing

meetings—i.e., meetings held regularly at a certain time by the same group—tend to become time-wasters because they require participation of personnel who may have no relevance to the topics proposed. Standing meetings are also money-wasters when you're paying employees an hourly rate to listen and not contribute to a discussion that has nothing to do with them and won't improve their work in any way—indeed, it just prevents them from accomplishing their own work for an hour or two. In their case, the benefits of information sharing can be better achieved by sending them the minutes (a written summary of the meeting's discussion).

Similarly, if the need for a meeting arises, do not rush into it without planning. A poorly planned meeting announced at the last minute is sure to waste time. People may be unable to change their schedules, may fail to attend, or may impede the progress and discussion of the group because of their absence. Those who attend may feel hindered because they needed more time to prepare and present comprehensive results to the group or committee.

If a meeting is necessary, and a clear purpose can be articulated, then you'll need to decide how and where to meet. With the option of web conferencing, distance is no longer an obstacle to participation, but meeting in person has many advantages over any technological mediation. People communicate both verbally and nonverbally—i.e., with facial expressions, eye contact, hand gestures, head nodding or head shaking, and posture. These subtleties of communication can be key to determining how group members really feel about an issue or question. Meeting in real time can be important, too, as all group members have the benefit of receiving and discussing new information at the same time. For purposes of our present discussion, we will focus on meetings taking place face to face in real time.

The blueprint for any meeting is the **agenda** document. It contains the following:

1. The **time, date, location**, list of **participants**, **purpose** statement, **call to order** identifying the person chairing or leading the meeting
2. **Introductions** if there is even one new participant in the group
3. **Roll call** listing the participants expected, which can be silently checked off by the participant in charge of recording minutes; a note is made beside the name of any absentees so that a list of actual participants is ready for the minutes
4. **Approval of the minutes**, where corrections to the previous meeting's minutes (sent out soon after the previous meeting) are suggested by participants who were there before the minutes are approved by the group for official archiving
5. **Old business** for discussing any issues left unresolved ("tabled") in the previous meeting
6. **New business** listing topics for discussion in order of priority so that the most important issues can be dealt with first so that items of lesser importance don't push the important ones off the agenda and into the next meeting if the lesser items end up taking longer than expected
 - The expected length of time is indicated for each item, with contentious items getting extra time to accommodate the depth of discussion expected.

- Items may include proposals for new initiatives, brief presentations reporting on recent developments or existing initiatives, and discussions about recent or upcoming developments
- Any preparatory work is indicated such as readings (e.g., reports that will be discussed) or reports that must be presented by individuals.

7. **Adjournment** for discussing when the next meeting shall take place

Writing the agenda requires soliciting information from the expected participants a couple of weeks in advance to work out scheduling and content details. Once the details are worked out, the agenda should be sent a week in advance to give participants time to do any preparatory reading (e.g., the previous meeting's minutes, which often accompany the agenda) or report writing.

Inviting participants via email has become increasingly common across business and industry. Software programs like Microsoft Outlook allow you to initiate a meeting request and receive an “accept” or “decline” response that integrates with your calendar to make the invitation process organized and straightforward. So that you don't get most participants declining an invitation because they are previously booked at the meeting time you've pitched, web apps like Doodle help determine the best time to meet by emailing the required participants a selection of times and determining what works best for all. Your Outlook calendar then allows you see what meetings and other commitments you have throughout your day to keep you on track.

If you are responsible for the room reservation, confirm it a week or two before the meeting and again the day before the meeting. Redundancy in the confirmation process can help eliminate a double-booking where two meetings are scheduled at the same time in the same place. If the meeting requires technology such as a projector for laptops to plug into or a web conferencing screen or telephone, confirm their reservation at the same time as you confirm the room reservation. Always personally inspect the room and test these systems prior to the meeting. There is nothing more embarrassing than introducing a high-profile speaker, such as the company president, and then finding that the PowerPoint projector is not working properly (*Business Communication for Success*, 2015, 15.3, 19.4).

11.3.2: Conducting the Meeting

If all the world's a stage, a meeting is a performance just like a job interview or speech presentation. Each member plays a role and should be aware of the responsibilities associated with it prior to the meeting. If the meeting's participants don't know each other, brief introductions at the outset serve to establish identity, credibility, and help the group get started on the business at hand. The purpose of the meeting should be clearly stated, and if there are rules or guidelines that require a specific protocol such as Robert's Rules of Order (Kennedy, 1997), they should be declared.

Mary Ellen Guffey (2007) provides a useful checklist for participants as a guide for how to conduct oneself during a meeting, adapted below for our use:

- Be prepared and have everything you need on hand
- Arrive on time and stay until the meeting adjourns (unless there are prior arrangements)
- Turn off cell phones and personal digital assistants; don't just switch them to vibrate and put them on the tabletop
- Engage in polite small talk with participants before the meeting begins; don't cut yourself off from human interaction by looking at your phone
- Follow the established protocol for taking turns speaking
- Respect time limits
- Leave the meeting only for established breaks or emergencies
- Demonstrate professionalism in your verbal and nonverbal interactions
- Communicate interest and stay engaged in the discussion
- Avoid tangents and side discussions
- Respect space and don't place your notebook or papers all around you
- Clean up after yourself
- Engage in conversation with other participants after

If you are cast in the role of meeting leader, you may need to facilitate the discussion and address conflict. The agenda serves as your guide and you may need to redirect the discussion to the topic, but always demonstrate respect for all members. You may also need to intervene if a point has reached a stalemate due to conflict (see §10.4 above on conflict resolution) and you need to push the meeting along to not fall behind the agenda schedule.

Transitions are often the hardest part of any meeting. Facilitating the transition from one topic to the next may require you to create links between each point. You can specifically note the next point on the agenda and verbally introduce the next speaker or person responsible for the content area. Once the meeting has accomplished its goals in the established time frame, it is time to facilitate the transition to a conclusion. You may conclude by summarizing what has been discussed or decided, and what actions the group members are to take as a result of the meeting. If there is a clear purpose for holding a subsequent meeting, discuss the time and date, as well as assignments for next time based on action items this time.

11.3.3: Meeting Follow-up: The Minutes

A permanent record of the meeting's discussion, known as "**minutes**," summarizes major points raised, decisions taken, and actions assigned. A meeting participant who is especially fast a typing is usually assigned

the role of recorder and adds bullet-point notes under each agenda item in the agenda soft copy to record the minutes. Action items should be highlighted since they are the main takeaways (e.g., “ACTION: Melinda to investigate new software for streamlining the job tendering process”). Emailed out to all participants afterwards, the minutes document serves not only as a reminder to those who attended, especially those tasked with action items, but can also be forwarded on to those who didn’t so they too can get a sense of decisions made and action items that may affect them. This is especially efficient if those non-attendees’ time is better used on other work rather than in a meeting. The document is usually considered tentative until officially approved at the next meeting, where it’s usually the first point on the agenda. If anyone noticed any inaccuracies in the previous meeting’s minutes, those are pointed out and corrected right away before the that previous meeting’s minutes are approved and archived.

11.3.4: Meeting-enhancing Technology

Given the widespread availability and increasingly low cost of electronic communication, technologies that once served to bring people together across continents and time zones now also serve people in the same geographic area. Rather than traveling to a central point for a face-to-face interaction via plane, car, or even elevator within the same building, busy and cost-conscious professionals often choose to see and hear each other via web conferencing or telephone conference-calling. Though these channels sacrifice some nonverbal communication to the convenience of not having to leave your office, their advantages make them a necessary part of workplace communication. Knowing how to use them is a key skill for all job seekers, especially if they’re used for a long-distance job interview. We will discuss the technologies by category, beginning with audio-only, then audio-visual, and finally social media (*Business Communication for Success*, 2015, 15.3, 19.4).

11.3.4.1: Audio-only Interactions

When participating in a meeting via phone because you can’t be present in person, most of the same rules of both in-person meetings (see above) and telephone calls (see §10.1.4 above) apply. When joining the meeting, however, it’s much more important than an in-person meeting to announce yourself as being present by saying your name and your role (“Hi everyone, I’m Natalie Legere, HR Payroll Specialist. Thanks for having me here today.”) so that the meeting includes you despite your being a disembodied voice.

If your role in the meeting is relatively minor, you may be silent for long stretches, which requires some responsibility both on your part and that of your fellow meeting participants. Your responsibility is to continue to be “present” in the sense of listening carefully for when you can and should contribute, as well as recording notes if necessary. If necessary, mute your microphone if background noise (e.g., a barking dog or crying baby) will come through to intrude on the meeting. The responsibility of the in-person participants, especially the

meeting chair, is to not forget that you're there, to include you when addressing the group as a whole, and even ensure you're still there by asking occasionally for a response.

11.3.4.2: Web Conferencing

If you've ever used Skype, Apple's Facetime, Google Hangouts, or the like socially, you're well familiar with online video (a.k.a. web) conferencing. Given the easy availability of these and a wide variety of other online applications, web conferencing is now standard for both one-on-one and group meetings with coworkers, managers, clients, and other stakeholders. It's so easy that some will use it for meetings with others on different floors of the same building let alone across the province, country, or the planet. Following some basic principles for how to prepare for and conduct such meetings can help make you a more effective communicator in this relatively new channel, or at least help you avoid embarrassment.

When **preparing for the meeting**, especially in your home, ensure that everything in the frame—yourself and the background—presents professionally. If you're doing a job video conferencing interview or the expectation of your audience is that you dress formally, dress as you would if you were meeting in person, including your bottom half. Just because the framing is such that they only see your top half doesn't guarantee that you won't have to get up at some point and be seen head to toe. You will be laughed out of a job if they see you in your shorts (or less) due to some unforeseen circumstance forcing you out of your seat.

The angle of your computer's camera is also important. Usually located right above your screen, the camera should be eye-level and 1-2 feet away to place you as the dominant figure in the frame. If it's about a foot (12 inches) away, your head and face will dominate, but the slight wide angle of the lens will distort you, making your nose more prominent relative to the rest of your face. At two feet away, your upper body and head will properly dominate and be in the correct proportion. Once your computer's camera is positioned three feet or more away and higher than eye-level, you minimize yourself too much and are swallowed up by your background. If the camera is too close and low because your laptop computer is literally on your lap or on a low desktop, on the other hand, the view up your nostrils will be unflattering.

Your background could include a general office scene or neighbouring cubicle if you're in the office, a bookcase if you're in the home, or a wall with tasteful art. If these are unavailable, a blank wall isn't a bad option compared with juvenile college dorm posters or domestic scenes such as a kitchen or living room—unless it's a very tasteful living room fireplace, for instance. If your background is a window, ensure that it isn't so bright that you're backlit to the point of being a dark shadowy figure. A light positioned near your camera and shining directly in your face will make you look like you're being interrogated, and a dim or unlit background will make you look like you're in a dungeon. A diffuse light from overhead lighting throughout the room or side lighting is best.

For the acoustics, choose an appropriately-sized room that doesn't echo strangely. A room with high ceilings and wood floors might echo too much. On the other hand, a room that's too small might make you sound like

you're in a closet. A carpeted and furnished 16'x16' room will soak up the sound well enough to make your voice resonate normally.

Also, control your environment to ensure that no background interruptions will embarrass you. If you're interviewing from home, talk to your cohabitants about not entering the room or making loud noises until you give the all-clear signal that you're done. If children or pets are around, ensure that you can lock the door to dampen or silence noise and avoid intrusions like the one that embarrassed Prof. Robert Kelly during a live BBC News interview about South Korea.

[http://www.youtube.com/watch?v=Mh4f9AYRCZY\[/embed\]](http://www.youtube.com/watch?v=Mh4f9AYRCZY[/embed])

Kelly looked like he had properly prepared for the interview as he had several times before. You can see a world map on the wall behind him suggesting expertise on international relations, a floor-to-ceiling bookshelf, and presumably his own books on the table. With the camera properly framing him in his nice suit, everything was set up to make him look like the professional expert he is—except this time he forgot to lock the door. Suddenly, a toddler in a bright yellow jumper burst in and marched in with a swagger behind him, forcing him to pause, push her back, and apologize repeatedly to the interviewer on air. Matters got worse for him—but even more hilarious for viewers—when his infant son followed, rolling into the room in a walker, as well as his panicked wife chasing them down, dragging them back out of the room while knocking books off the table in the kerfuffle, and, from a crawl on the floor, slamming the door behind them. Though the video immediately went viral and amused the world in the days following the March 2017 incident, a less cute and slapstick intrusion may have ruined his career as a TV talking head in the way he thought it would just after it happened (Usborne, 2017).

Finally, test the connection with someone else to ensure that it works if you're not used to communicating in this way. Check that the framing, lighting, your appearance, and the background are all in order. Test the volume so that you can be properly heard and hear your audience in turn. Once you've web conferenced several times, you'll have the procedure for setting up and logging in so down pat that you won't need to test your connection further.

During the interview or meeting, ensure your professionalism by doing the following:

- **Look directly into the camera** when speaking so that your audience sees you maintaining good eye contact with them. You may be tempted instead to look at your audience (only a few inches away from the camera) on the screen or, worse, at yourself in the bottom-corner inset view of what your audience sees, perhaps checking to make sure you look good. (You can see Prof. Kelly check this view and notice his children enter in the BBC interview mentioned above, though you can also see him try to maintain professionalism by looking back to the camera directly as much as possible.) It will be off-putting to your audience to see you looking away constantly and suspect that you're looking at yourself narcissistically rather than paying attention to them.
- **Pause** longer than you normally would after speaking to give your audience time to respond. If you pause after speaking and don't hear a reply during an in-person meeting, you may feel compelled to

speak again, perhaps asking to confirm that they understood you. With web conferencing, however, anticipate a slight delay of about a second or more as the signal bounces around the communications network, which may include optical cables crossing the ocean floor depending on where you and your audience are located. Be patient so that you don't end up awkwardly speaking over each other.

- **Mute your microphone** if you're not talking to avoid background noise intruding, especially if it's beyond your control. When you're about to talk again, ensure that the microphone volume is back up so that you don't confuse everyone by speaking mutely.
- **Avoid doing other work**, emailing, or browsing the internet during the conference call. Your audience will be able to tell that you're engaged with something other than their conversation. They will probably feel the same way if you ignored them to look at your phone during an in-person meeting (Lovgren, 2017).

Bearing these differences in mind, a web conference meeting should otherwise proceed much like an in-person meeting discussed throughout this section.

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CHAPTER 12: DEVELOPING PRESENTATIONS

eCampusOntario

Chapter Learning Objectives

- Identify the different methods of speech delivery.
- Identify key elements in preparing to deliver a speech.
- Understand the benefits of delivery-related behaviors.
- Use specific techniques to enhance speech delivery.

- 12.1 Introduction
- 12.2 Methods of Presentation Delivery
- 12.3 Preparing For Your Delivery
- 12.4 Practising Your Delivery
- 12.5 What to Do When Delivering Your Speech
- 12.6 Conclusion

12.1 INTRODUCTION

Introduction



Abe has spent weeks doing research and crafting a strong, well-prepared, researched presentation. On the day she gets in front of the finance team, she makes a few mistakes because of nerves. While she may view it as a complete failure, her audience will have gotten a lot of good information, and most likely written off her mistakes due to nerves (surely they would be nervous in the same situation!).

Abe's colleague, Chris, on the other hand, does almost no preparation for his presentation, but, being charming and comfortable in front of a crowd, smiles a lot while providing virtually nothing of substance. The audience takeaway from Chris's speech is, "I have no idea what he was talking about" and other feelings ranging from "He's good in front of an audience" to "I don't trust him."

As you read this chapter, consider strategies that Abe might use to reduce her nervousness, and ways that Chris might be better prepared for his presentations.

Many surveys have shown that public speaking is at the top of the list of fears for most people — sometimes, more high on the list than death. No one is afraid of writing their speech or conducting the research: people generally only fear the delivery aspect of the speech, which, compared to the amount of time you will put into writing the speech (days, hopefully), will be the shortest part of the speech giving process (5-8 minutes, generally, for classroom speeches). The irony, of course, is that delivery, being the thing people fear the most, is simultaneously the aspect of public speaking that will require the least amount of time.

Watch this 15 minute TEDtalks video: [Why People Fear Public Speaking with Dave Guin](#)



*A YouTube element has been excluded from this version of the text. You can view it online here:
<https://pressbooks.nsc.ca/llscomm/?p=184>*

Direct Link: Why do we fear public speaking? | Dave Guin | TEDxCPP

Chapter Preview

- The Importance of Delivery
- Methods of Speech Delivery
- Preparing For Your Delivery
- Practicing Your Delivery
- What to do When Delivering Your Speech
- Conclusion

12.2 METHODS OF PRESENTATION DELIVERY

The Importance of Delivery



Delivery is what you are probably most concerned about when it comes to giving presentations. This chapter is designed to help you give the best delivery possible and eliminate some of the nervousness you might be feeling. To do that, you should first dismiss the myth that public speaking is just reading and talking at the same time. Speaking in public has more formality than talking. During a speech, you should present yourself professionally. This doesn't necessarily mean you must wear a suit or "dress up", but it does mean making yourself presentable by

being well groomed and wearing clean, appropriate clothes. It also means being prepared to use language correctly and appropriately for the audience and the topic, to make eye contact with your audience, and to look like you know your topic very well.

While speaking has more formality than talking, it has less formality than reading. Speaking allows for flexibility, meaningful pauses, eye contact, small changes in word order, and vocal emphasis. Reading is a more or less exact replication of words on paper without the use of any non-verbal interpretation. Speaking, as you will realize if you think about excellent speakers you have seen and heard, provides a more animated message.

Methods of Presentation Delivery

There are four methods of delivery that can help you balance between too much and too little formality when giving a presentation.

Impromptu Speaking

Impromptu speaking is the presentation of a short message without advance preparation. You have probably done impromptu speaking many times in informal, conversational settings. Self-introductions in group

settings are examples of impromptu speaking: “Hi, my name is Steve, and I’m an account manager.” Another example of impromptu presenting occurs when you answer a question such as, “What did you think of the report?” Your response has not been preplanned, and you are constructing your arguments and points as you speak. Even worse, you might find yourself going into a meeting and your boss says, “I want you to talk about the last stage of the project. . .” and you had no warning.

The advantage of this kind of speaking is that it’s spontaneous and responsive in an animated group context. The disadvantage is that the speaker is given little or no time to contemplate the central theme of his or her message. As a result, the message may be disorganized and difficult for listeners to follow.

Here is a step-by-step guide that may be useful if you are called upon to give an impromptu presentation in public:

1. Take a moment to collect your thoughts and plan the main point you want to make.
2. Thank the person for inviting you to speak. Avoid making comments about being unprepared, called upon at the last moment, on the spot, or feeling uneasy.
3. Deliver your message, making your main point as briefly as you can while still covering it adequately and at a pace your listeners can follow.
4. If you can use a structure, using numbers if possible: “Two main reasons . . .” or “Three parts of our plan. . .” or “Two side effects of this drug. . .” Timeline structures are also effective, such as “past, present, and future or East Coast, Midwest, and West Coast”.
5. Thank the person again for the opportunity to speak.
6. Stop talking (it is easy to “ramble on” when you don’t have something prepared). If in front of an audience, don’t keep talking as you move back to your seat.

Impromptu presentations: the presentation of a short message without advance preparation. Impromptu presentations are generally most successful when they are brief and focus on a single point.

For additional advice on impromptu speaking, watch the following 4 minute video from Toastmasters:

Impromptu Speaking

<https://www.youtube.com/watch?v=GefKPy5YYHI>[/embed]

Manuscript Presentations

Manuscript presentations are the word-for-word iteration of a written message. In a manuscript presentation, the speaker maintains their attention on the printed page except when using visual aids. The advantage of reading from a manuscript is the exact repetition of original words. In some circumstances this can be extremely important. For example, reading a statement about your organization’s legal responsibilities to customers may require that the original words be exact.

A manuscript presentation may be appropriate at a more formal affair (like a report to shareholders), when

your presentation must be said exactly as written in order to convey the proper emotion or decorum the situation deserves.

However, there are costs involved in manuscript presentations. First, it's typically an uninteresting way to present. Unless the presenter has rehearsed the reading as a complete performance animated with vocal expression and gestures, the presentation tends to be dull. Keeping one's eyes glued to the script prevents eye contact with the audience. For this kind of "straight" manuscript presentation to hold audience attention, the audience must be already interested in the message and presenter before the delivery begins.

It is worth noting that professional speakers, actors, news reporters, and politicians often read from an autocue device, commonly called a teleprompter, especially when appearing on television, where eye contact with the camera is crucial. With practice, a presenter can achieve a conversational tone and give the impression of speaking extemporaneously and maintaining eye contact while using an autocue device. However, success in this medium depends on two factors: (1) the presenter is already an accomplished public speaker who has learned to use a conversational tone while delivering a prepared script, and (2) the presentation is written in a style that sounds conversational and in spoken rather than written, edited English.

Extemporaneous Presentations

Extemporaneous presentations are carefully planned and rehearsed presentations, delivered in a conversational manner using brief notes. By using notes rather than a full manuscript, the extemporaneous presenter can establish and maintain eye contact with the audience and assess how well they are understanding the presentation as it progresses. Without all the words on the page to read, you have little choice but to look up and make eye contact with your audience.

Watch the following 10 minute video of a champion speaker presenting his extemporaneous speech: *2017 International Extemporaneous Speaking National Champion — Connor Rothschild Speech*

<https://www.youtube.com/watch?v=lzoUu1fDmWE>[/embed]

Presenting extemporaneously has some advantages. It promotes the likelihood that you, the speaker, will be perceived as knowledgeable and credible since you know the speech well enough that you don't need to read it. In addition, your audience is likely to pay better attention to the message because it is engaging both verbally and nonverbally. It also allows flexibility; you are working from the strong foundation of an outline, but if you need to delete, add, or rephrase something at the last minute or to adapt to your audience, you can do so.

The disadvantage of extemporaneous presentations is that in some cases it does not allow for the verbal and the nonverbal preparation that are almost always required for a good speech.

Adequate preparation cannot be achieved the day before you're scheduled to present, so be aware that if you want to present a credibly delivered speech, you will need to practice many times. Because extemporaneous presenting is the style used in the great majority of business presentation situations, most of the information in the subsequent sections of this chapter is targeted toward this kind of speaking.

Memorized Speaking

Memorized speaking is the recitation of a written message that the speaker has committed to memory. Actors, of course, recite from memory whenever they perform from a script in a stage play, television program, or movie scene. When it comes to speeches, memorization can be useful when the message needs to be exact and the speaker doesn't want to be confined by notes.

The advantage to memorization is that it enables the speaker to maintain eye contact with the audience throughout the speech. Being free of notes means that you can move freely around the stage and use your hands to make gestures. If your speech uses visual aids, this freedom is even more of an advantage. However, there are some real and potential costs.

First, unless you also plan and memorize every vocal cue (the subtle but meaningful variations in speech delivery, which can include the use of pitch, tone, volume, and pace), gesture, and facial expression, your presentation will be flat and uninteresting, and even the most fascinating topic will suffer. Second, if you lose your place and start trying to ad lib, the contrast in your style of delivery will alert your audience that something is wrong. More frighteningly, if you go completely blank during the presentation, it will be extremely difficult to find your place and keep going. Obviously, memorizing a typical seven-minute presentation takes a great deal of time and effort, and if you aren't used to memorizing, it is very difficult to pull off. Realistically, you probably will not have the time necessary to give a completely memorized speech. However, if you practice adequately, your approach will still feel like you are being extemporaneous.

12.3 PREPARING FOR YOUR DELIVERY

Your audiences, circumstances, and physical contexts for presenting will vary, but will arise regularly in any business environment. Being prepared to deal with different presenting situations will help reduce anxiety you may have about giving a speech, so let's look at some common factors you need to keep in mind as you prepare for a typical business presentation.

Using Lecterns: Lecterns add formality to the presentation situation, but it can be tempting to hide behind it. Use it to hold your notes only. This will enhance your eye contact as well as free up your hands for gesturing, and give the appearance of confidence.

Large spaces: auditoriums or other large spaces can be intimidating. Preparation and practice will prevent poor performance; a rehearsal, if available, can also ease nerves. Slowing your speech to allow for echo, and adjust visual aids so they can be seen by those in the back of the hall.

Small spaces: these are usually easier to manage for presenters, but use note cards and visual aids carefully, as your audience will be able to see everything. Ideally, arrive early to set up your presentation material to prevent fumbling and delays.

Outdoors: Noise (cars, wind), insects, weather, sunshine and other environmental factors may be hard to control. Do your best to project your voice without yelling, and choose locations that are quiet and sheltered, if possible.

Using a Microphone: you can avoid difficulties with microphones by doing a rehearsal or test ahead of time. Ensure you enunciate clearly and give a few inches between your face and the microphone.

Small Audience Size: A small audience will allow for greater contact, but may invite interruptions. Deal with any questions politely and say you'll try to answer that question at the end of the presentation. Or, set the agenda at the beginning so that the audience knows there will be a question-and-answer period at the end.



The following web pages provide some additional concepts and strategies for presentations:

Five Presentation Mistakes Everyone Makes

The Ten Most Common Presentation Mistakes

8 Tips on Giving Presentations Like a Pro

12.4 PRACTISING YOUR DELIVERY

There is no foolproof recipe for good delivery. You are a unique person, and you embody different experiences and interests from others. This means you have an approach, or a style, that is effective for you. It also means that your concern about what others think of you can cause anxiety, even during the most carefully researched and interesting presentation. But there are some techniques you can use to minimize that anxious feeling and put yourself in the best possible position to succeed on presentation day. You need to prepare for your presentation in as realistic a simulation as possible. What follows are some general tips you should keep in mind, but they all essentially derive from one very straight-forward premise: Practice your presentation beforehand, at home or elsewhere, the way you will give it in person.

Practice Your Presentation Out Loud

Practice allows you to learn what to say, when and how to say it, but it also lets you know where potential problems lie. Since you will be speaking with a normal volume for your presentation, you need to practice that way, even at home. This helps you learn the presentation, but it will help identify any places where you tend to mispronounce words. Also, sentences on paper do not always translate well to the spoken medium. Practicing out loud allows you to actually hear where you have trouble and fix it before getting up in front of the audience.

Practice Your Presentation Standing Up

Since you will be standing for your presentation (in all likelihood), you need to practice that way. As we mention in more detail below, the default position for delivering a presentation is with your feet shoulder-width apart and your knees slightly bent. Practising this way will help develop muscle memory and will make it feel more natural when you are doing it for real.

Practice Your Presentation with an Audience

The best way to prepare for the feeling of having someone watch you while giving a presentation is to have someone watch you while you practice. Ask your colleagues, friends, family, or significant other to listen to you while running through what you will say. Not only will you get practice in front of an audience, but they may be able to tell you about any parts that were unclear or problems you might encounter when delivering it on the day. During practice, it may help to pick out some strategically placed objects around the room to occasionally

glance at just to get into the habit of looking around more often and making eye contact with multiple people in your audience.

Practice Your Presentation for Time

You'll likely have a time limit for presentation. As a rule of thumb, plan to have a 60-second "buffer" at the end of your presentation, in case something goes wrong. For example, if your presentation is set for 10 minutes, plan for nine minutes. Should you rush through or end early, make sure you can add more detail to the end of your presentation if needed. With all of this in mind, practising at least three times at home will ensure your presentation is properly timed.

Practice Your Presentation by Filming Yourself

There is nothing that gets you to change what you're doing or correct a problem quicker than seeing yourself doing something you don't like on video. By watching yourself, you will notice all the small things you do that might prove to be distracting during the actual presentation.

It is important enough that it deserves reiterating: Practice your speech beforehand, at home or elsewhere, the way you will give it on the scheduled day.

12.5 WHAT TO DO WHEN DELIVERING YOUR SPEECH

The interplay between the verbal and nonverbal components of your speech can either bring the message vividly to life or confuse or bore the audience. Therefore, it is best that you neither over-dramatize your speech delivery behaviors nor downplay them. This is a balance achieved through rehearsal, trial and error, and experience. One way to think of this is in terms of the Goldilocks paradigm: you don't want to overdo the delivery because you might distract your audience by looking hyper or overly animated. Conversely, someone whose delivery is too understated (meaning they don't move their hands or feet at all) looks unnatural and uncomfortable, which can also distract. Just like Goldilocks, you want a delivery that is "just right". This middle ground between too much and too little is a much more natural approach to public speaking delivery, which will be covered in more detail in the following sections where we discuss aspects of your delivery and what you need to think about while actually giving your speech.

Watch the following 10 minute video: *Use Body Language to Rock Your Next Presentation*

[https://www.youtube.com/watch?v=pp4YlyXjcKI\[/embed\]](https://www.youtube.com/watch?v=pp4YlyXjcKI[/embed])

Hands: Use your hands as naturally as you would in normal conversation. Try to pay attention to what you do with your hands in regular conversations and incorporate that into your delivery. If you're not comfortable with that, rest them on the lectern or fold them in front of your body.

Feet: stand shoulder-width apart, keeping your knees slightly bent. If you are comfortable, try walking around a bit if space allows and it appears natural in practice. Avoid shifting from foot-to-foot, or bouncing nervously.

Objects: bring only what you need to give your presentation. Anything else will be a distraction. Turn off any personal devices (cell phones, tablets) so there are no interruptions.

Clothing: dress professionally, based on the culture of your organization. Avoid jewelry that could make noise, uncomfortable shoes or any item that hangs from you. Tie back long hair so you are not tempted to touch or move it.

Eye Contact: Eye contact is an extremely important element of your delivery. The general rule of thumb is to aim for 80 percent of your total speech time be spent making eye contact with your audience (Lucas, 2015, p. 250).

Watch the following videos for additional visual advice:

5 minute video: *How to Make Eye Contact When Presenting*

[https://www.youtube.com/watch?v=bHblBfPy5qU\[/embed\]](https://www.youtube.com/watch?v=bHblBfPy5qU[/embed])

8 minute video: Video For Practicing Eye Contact – *FOUR Difficulty Levels*

<https://www.youtube.com/watch?v=aZmlS7n7Re4>

Volume: The volume you use should fit the size of the audience and the room.

Rate: How quickly or slowly you say the words of your speech is the rate. You especially will want to maintain a good, deliberate rate at the beginning of your speech because your audience will be getting used to your voice.

Vocalized Pauses: Everyone uses vocalized pauses to some degree, but not everyone's are problematic. This obviously becomes an issue when the vocalized pauses become distracting due to their overuse. Identify your own common vocalized pauses and try to catch yourself to begin the process of reducing your dependence on them.

The items listed above represent the major delivery issues you will want to be aware of when giving a speech, but it is by no means an exhaustive list.

There is however, one final piece of delivery advice. No matter how hard you practice and how diligent you are in preparing for your presentation, you are most likely going to mess up some aspect at some point. That's normal. Everyone does it. The key is to not make a big deal about it or let the audience know you messed up. Odds are that they will never even realize your mistake if you don't tell them there was a mistake.

12.6 CONCLUSION

Good delivery is meant to augment your presentation and help convey your information to the audience. Anything that potentially distracts your audience means that fewer people will be informed, persuaded, or entertained by what you have said. Practicing your presentation in an environment that closely resembles the actual situation that you will be speaking in will better prepare you for what to do and how to deliver your speech when it really counts.



Returning to Abe's story, where she felt well-prepared but became nervous in the moment of her presentation, what did you learn in this chapter that might be useful for her (or for yourself) related to last minute nerves? What about Abe's colleague Chris. He was very unprepared for his presentation. What have you learned in this chapter about preparation?

Something to Think About

Most people struggle with at least one aspect of delivery: voice, posture, eye contact, distracting movement, vocalized pauses, etc. What do you struggle with? Based on this chapter and what you have already experienced in class, what is your biggest takeaway about improving delivery?

Check your Understanding



An interactive or media element has been excluded from this version of the text. You can view it online here:

<https://pressbooks.nsc.ca/llscomm/?p=196>



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An interactive or media element has been excluded from this version of the text. You can view it online here:

<https://pressbooks.nsc.ca/llscomm/?p=196>

Additional Resources

Duarte, N. (2011). The secret structure of great talks [Video]. Retrieved from https://www.ted.com/talks/nancy_duarte_the_secret_structure_of_great_talks^[i]

Chapter Glossary

Extemporaneous presentations – carefully planned and rehearsed presentations, delivered in a conversational manner using brief notes.

Goldilocks paradigm – you don't want to overdo (or understate) the delivery of your presentation because

you might distract your audience by looking hyper or overly animated.

Impromptu presentation – the presentation of a short message without advance preparation.

Impromptu speaking – the presentation of a short message without advance preparation.

Manuscript presentations – the word-for-word iteration of a written message.

Memorized speaking – the recitation of a written message that the speaker has committed to memory.

Rate – how quickly or slowly you say the words of your speech.

Chapter References

Tucker, B., & Barton, K. (2016). *Exploring public speaking: 2nd revision*. Retrieved from <http://oer.galileo.usg.edu/communication-textbooks/1>

CHAPTER 13: PRESENTATIONS TO INFORM

eCampusOntario

Chapter Learning Objectives

1. Describe the functions of the speech to inform.
2. Provide examples of four main types of speech to inform.
3. Articulate and demonstrate an audience-centered perspective.
4. Provide and demonstrate examples of ways to facilitate active listening.
5. Discuss and provide examples of ways to incorporate ethics in a speech.

- 13.1 Introduction
- 13.2 Functions of the Presentation to Inform
- 13.3 Types of Presentations to Inform
- 13.4 Adapting Your Presentation to Teach
- 13.5 Preparing Your Speech to Inform
- 13.6 Creating an Informative Presentation
- 13.7 Conclusion

13.1 INTRODUCTION

Introduction



Dhavit is passionate about the environment and is planning on using his knowledge to develop a speech to help make his colleagues more aware of the impact people are having on the world in terms of pollution. As you read through this chapter, consider how Dhavit might adapt his planning and delivery to teach and inform his colleagues.

Storytelling is a basic part of human communication. With each story you were sharing information, but is sharing the same as informing?

At some point in your business career you will be called upon to teach someone something. It may be a customer, coworker, or supervisor, and in each case you are performing an informative speech. It is distinct from a sales speech, or persuasive speech, in that your goal is to communicate the information so that your listener understands. The informative speech is one performance you'll give many times across your career, whether your audience is one person, a small group, or a large auditorium full of listeners. Once you master the art of the informative speech, you may mix and match it with other styles and techniques.

Watch the following 2 minute video from Commander Chris Hadfield: *How Astronauts Wash Their Hands in Space*

[https://www.youtube.com/watch?v=JUUVlnnVMSQ\[/embed\]](https://www.youtube.com/watch?v=JUUVlnnVMSQ[/embed])

Chapter Preview

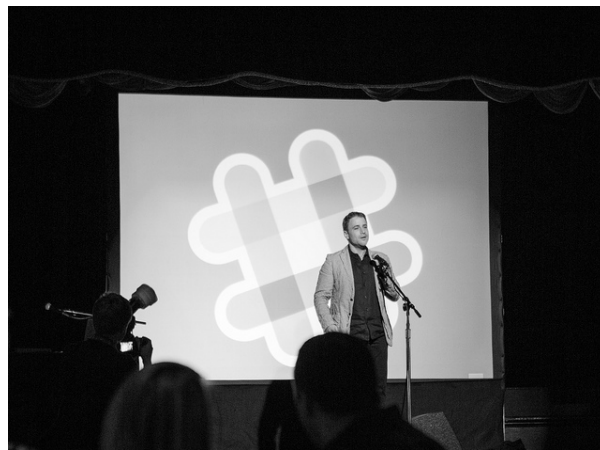
- Functions of the Presentation to Inform

- Types of Presentations to Inform
- Adapting Your Presentation to Teach
- Preparing to Perform
- Creating an Informative Presentation
- Conclusion

13.2 FUNCTIONS OF THE PRESENTATION TO INFORM

Informative presentations focus on helping the audience to understand a topic, issue, or technique more clearly. There are distinct functions inherent in a speech to inform, and you may choose to use one or more of these functions in your speech. Let's take a look at the functions and see how they relate to the central objective of facilitating audience understanding.

Share



“Speech” by Schill is shared under a CC BY license

The basic definition of communication highlights the process of understanding and sharing meaning. An informative speech follows this definition when a speaker shares content and information with an audience. As part of a speech, you wouldn't typically be asking the audience to respond or solve a problem. Instead you'd be offering to share with the audience some of the information you have gathered related to a topic.

Increase Understanding

How well does your audience grasp the information? This should be a guiding question to you on two levels. The first involves what they already know—or don't know—about your topic, and what key terms or ideas might be necessary for someone completely unfamiliar with your topic to grasp the ideas you are presenting. The second involves your presentation and the illustration of ideas. The audience will respond to your attention statement and hopefully maintain interest, but how will you take your speech beyond

superficial coverage of content and effectively communicate key relationships that increase understanding? These questions should serve as a challenge for your informative speech, and by looking at your speech from an audience-oriented perspective, you will increase your ability to increase the audience's understanding.

Change Perceptions

How you perceive something has everything to do with a range of factors that are unique to you. We all want to make sense of our world, share our experiences, and learn that many people face the same challenges we do. For instance, many people perceive the process of speaking in public as a significant challenge, and in this text, we have broken down the process into several manageable steps. In so doing, we have to some degree changed your perception of public speaking.

When you present your speech to inform, you may want to change the audience member's perceptions of your topic. You may present an informative speech on air pollution and want to change common perceptions such as the idea that most of North America's air pollution comes from private cars. You won't be asking people to go out and vote, or change their choice of automobiles, but you will help your audience change their perceptions of your topic.

Gain Skills

Just as you want to increase the audience's understanding, you may want to help the audience members gain skills. If you are presenting a speech on how to make a meal from fresh ingredients, your audience may thank you for not only the knowledge of the key ingredients and their preparation but also the product available at the conclusion. If your audience members have never made their own meal, they may gain a new skill from your speech.

Exposition versus Interpretation

When you share information informally, you often provide your own perspective and attitude for your own reasons. The speech to inform the audience on a topic, idea, or area of content is not intended to be a display of attitude and opinion.

The speech to inform is like the classroom setting in that the goal is to inform, not to persuade, entertain, display attitude, or create comedy. If you have analyzed your audience, you'll be better prepared to develop appropriate ways to gain their attention and inform them on your topic. You want to communicate thoughts, ideas, and relationships and allow each listener specifically, and the audience generally, to draw their own conclusions. The speech to inform is all about sharing information to meet the audience's needs, not your own.

Exposition

This relationship between informing as opposed to persuading your audience is often expressed in terms of exposition versus interpretation.

Exposition means a public exhibition or display, often expressing a complex topic in a way that makes the relationships and content clear. The goal is to communicate the topic and content to your audience in ways that illustrate, explain, and reinforce the overall content to make your topic more accessible to the audience. The audience wants to learn about your topic and may have some knowledge on it as you do. It is your responsibility to consider ways to display the information effectively.

Interpretation and Bias

Interpretation involves adapting the information to communicate a message, perspective, or agenda. Your insights and attitudes will guide your selection of material, what you focus on, and what you delete (choosing what not to present to the audience). Your interpretation will involve personal bias.

Bias is an unreasoned or not-well-thought-out judgment. Bias involves beliefs or ideas held on the basis of conviction rather than current evidence. Beliefs are often called “habits of the mind” because we come to rely on them to make decisions. Which is the better, cheapest, most expensive, or the middle-priced product? People often choose the middle-priced product and use the belief “if it costs more it must be better” (and the opposite: “if it is cheap it must not be very good”). The middle-priced item, regardless of actual price, is often perceived as “good enough.” All these perceptions are based on beliefs, and they may not apply to the given decision or even be based on any evidence or rational thinking.

We take mental shortcuts all day long, but in our speech to inform, we have to be careful not to reinforce bias.

Point of View

Clearly no one can be completely objective and remove themselves from their own perceptual process. People express themselves and naturally relate what is happening now to what has happened to them in the past. You are your own artist, but you also control your creations.

Objectivity involves expressions and perceptions of facts that are free from distortion by your prejudices, bias, feelings or interpretations. For example, is the post office box blue? An objective response would be yes or no, but a subjective response might sound like “Well, it’s not really blue as much as it is navy, even a bit of purple.” Subjectivity involves expressions or perceptions that are modified, altered, or impacted by your personal bias, experiences, and background. In an informative speech, your audience will expect you to present the information in a relatively objective form. The speech should meet the audience’s need as they learn about the content, not your feelings, attitudes, or commentary on the content.

Here are five suggestions to help you present a neutral speech:



Keep your language neutral.



Keep your sources credible and not from biased organizations.



Keep your presentation balanced. If you use a source that supports one clear side of an issue, include an alternative source and view. Give each equal time and respectful consideration.



Keep your audience in mind. Not everyone will agree with every point or source of evidence, but diversity in your speech will have more to offer everyone.



Keep who you represent in mind: Your business and yourself.

To summarize, the purpose of an informative speech is to share ideas with the audience, increase their understanding, change their perceptions, or help them gain new skills.

An informative speech incorporates the speaker's point of view but not attitude or interpretation.

13.3 TYPES OF PRESENTATIONS TO INFORM

Speaking to inform may fall into one of several categories. The presentation to inform may be

- an explanation,
- a report,
- a description,
- or a demonstration of how to do something.

In the sections below each of these types of informative speech will be described.

Explanation

Have you ever listened to a lecture or speech where you just didn't get it? It wasn't that you weren't interested, at least not at first. Perhaps the presenter used language you didn't understand or gave a confusing example. Soon you probably lost interest and sat there, attending the speech in body but certainly not in mind. An effective speech to inform will take a complex topic or issue and explain it to the audience in ways that increase audience understanding.

No one likes to feel left out. As the speaker, it's your responsibility to ensure that this doesn't happen. Also know that to teach someone something new—perhaps a skill that they did not possess or a perspective that allows them to see new connections—is a real gift, both to you and the audience members. You will feel rewarded because you made a difference and they will perceive the gain in their own understanding.

Watch the following 2 minute video: *Understand the Blockchain in Two Minutes*

[https://www.youtube.com/watch?v=r43LhSUUGTQ\[/embed\]](https://www.youtube.com/watch?v=r43LhSUUGTQ[/embed])

Report

As a business communicator, you may be called upon to give an informative report where you communicate status, trends, or relationships that pertain to a specific topic. The informative report is a speech where you organize your information around key events, discoveries, or technical data and provide context and illustration for your audience. They may naturally wonder, “Why are sales up (or down)?” or “What is the product leader in your lineup?” and you need to anticipate their perspective and present the key information that relates to your topic.

Description

Have you ever listened to a friend tell you about their recent trip somewhere and found the details fascinating, making you want to travel there or visit a similar place? Describing information requires emphasis on language that is vivid, captures attention, and excites the imagination. Your audience will be drawn to your effective use of color, descriptive language, and visual aids. An informative speech that focuses description will be visual in many ways. Use your imagination to place yourself in their perspective: how would you like to have someone describe the topic to you?

Demonstration

You want to teach the audience how to program the applications on a new smartphone. A demonstrative speech focuses on clearly showing a process and telling the audience important details about each step so that they can imitate, repeat, or do the action themselves. Consider the visual aids or supplies you will need.

By considering each step and focusing on how to simplify it, you can understand how the audience might grasp the new information and how you can best help them. Also, consider the desired outcome; for example, will your listeners be able to actually do the task themselves? Regardless of the sequence or pattern you will illustrate or demonstrate, consider how people from your anticipated audience will respond, and budget additional time for repetition and clarification.

Chefs inform through demonstration. Although they make it seem easy, it is complex and difficult.



Canadian chef Susur Lee by NAIT is licensed CC BY ND 2.0

Informative presentations come in all sizes, shapes, and forms. The main goal in an informative presentation is to inform, not to persuade, and that requires an emphasis on credibility, for the speaker and the data or information presented.

Here are additional, more specific types of informative presentations:

- Biographical information
- Case study results
- Comparative advantage results
- Cost-benefit analysis results
- Feasibility studies
- Field study results
- Financial trends analysis
- Health, safety, and accident rates
- Instruction guidelines
- Laboratory results
- Product or service orientations
- Progress reports
- Research results
- Technical specifications

Depending on the situation, the audience, and the specific information to be presented, any of these types of presentation may be given as an explanation, a report, a description, or a demonstration.

In summary, an informative speech may explain, report, describe, or demonstrate how to do something.

13.4 ADAPTING YOUR PRESENTATION TO TEACH

Successfully delivering an informative speech requires adopting an audience-centered perspective. Imagine that you are in the audience. What would it take for the speaker to capture and maintain your attention? What would encourage you to listen? In this section we present several techniques for achieving this, including motivating your audience to listen, framing your information in meaningful ways, and designing your presentation to appeal to diverse learning styles.

Motivating the Listener

In an ideal world, every audience member would be interested in your topic. Unfortunately, however, not everyone will be equally interested in your informative speech. So what is a speaker to do in order to motivate the listener?

The perception process involves selection or choice, and you want your audience to choose to listen to you. Begin with your attention statement at the beginning of your speech and make sure it is dynamic and arresting. Remember what active listening involves, and look for opportunities throughout your speech to encourage active listening.

Review and consider using the seven strategies below by posing questions that audience members may think, but not actually say out loud, when deciding whether to listen to your speech. By considering each question, you will take a more audience-centered approach to developing your speech, increasing your effectiveness.



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1. How Is Your Topic Relevant to Me?

A natural question audience members will ask themselves is, what does the topic have to do with me? Why should I care about it? Relevance means that the information applies, relates, or has significance to the listener. Find areas of common ground and build on them in your presentation.

2. What Will I Learn from You?

This question involves several issues. How much does the audience already know about your subject? What areas do you think they might not know? By building on the information the audience knows, briefly reviewing it and then extending it, illustrating it, and demonstrating the impact, you inform them of things they didn't already know.

3. Why Are You Interested in This Topic?

Your interest in your topic is an excellent way to encourage your audience to listen. You probably selected your topic with your audience in mind, but also considered your interest in the topic. Why did you choose it over other topics? What about your topic aroused your attention? Did it stimulate your curiosity? Did it make you excited about researching and preparing a speech on it? These questions will help you clarify your interest, and by sharing the answers with your listeners, you will stimulate excitement on their part.

4. How Can I Use the Knowledge or Skills You Present to Me?

In an informative speech you are not asking your listeners to go out and vote, or to quit smoking tomorrow, as you would in a persuasive speech. Nevertheless, you need to consider how they will apply their new understanding. Application involves the individual's capacity for practical use of the information, skill, or knowledge. As a result of your speech, will your listeners be able to do something new or understand a topic better?

5. What Is New about What You Propose to Present?

People are naturally attracted to something new, unusual or unfamiliar—but we also like predictability. As a speaker, how do you meet the two contrasting needs for familiarity and something new?

Address both. You may want to start by forming a clear foundation on what you have in common with the audience. Present the known elements of your topic and then extend into areas where less is known, increasing

the new information as you progress. People will feel comfortable with the familiar, and be intrigued by the unfamiliar.

6. Are You Going to Bore Me?

You have probably sat through your fair share of boring lectures where the speaker, teacher, or professor talks at length in a relatively monotone voice, fails to alternate his or her pace, incorporates few visual aids or just reads from a PowerPoint show for an hour in a dimly lighted room. Recall how you felt. Trapped? Tired? Did you wonder why you had to be there? Then you know what you need to avoid.

Being bored means the speaker failed to stimulate you as the listener, probably increased your resistance to listening or participating, and became tiresome. To avoid boring your audience, speak with enthusiasm, and consider ways to gain, and keep gaining, their attention. You don't have to be a standup comedian, however, to avoid being a boring speaker.

Consider the question, "What's in it for me?" from the audience's perspective and plan to answer it specifically with vivid examples. If your presentation meets their expectations and meets their needs, listeners are more likely to give you their attention.

You may also give some thought and consideration to the organizational principle and choose a strategy that promises success. By organizing the information in interesting ways within the time frame, you can increase your effectiveness.

7. Is This Topic Really as Important as You Say It Is?

No one wants to feel like his or her time is being wasted. What is important to you and what is important to your audience may be two different things. Take time and plan to reinforce in your speech how the topic is important to your audience. Importance involves perceptions of worth, value, and usefulness.

Framing

The presentation of information shapes attitudes and behavior. This is done through framing and content. Framing involves placing an imaginary set of boundaries, much like a frame around a picture or a window, around a story, of what is included and omitted, influencing the story itself. What lies within the frame that we can see? What lies outside the frame that we cannot see?

Setting the agenda, just like the agenda of a meeting, means selecting what the audience will see and hear and in what order. In giving a speech, you select the information and set the agenda. You may choose to inform the audience on a topic that gets little press coverage, or use a popular story widely covered in a new way, with a case example and local statistics.

Another aspect of framing your message is culture. Themes of independence, overcoming challenging

circumstances, and hard-fought victories may represent aspects of certain cultures in the world. If appropriate for your topic, consider localizing your presentation to incorporate cultural values in the region or nation of your audience.



Additional Tips for Success

Andrews, Andrews, and Williams (1999) offer eight ways to help listeners learn. These are adapted and augmented here.

1. Limit the Number of Details

While it may be tempting to include many of the facts you've found in your research, choose only those that clearly inform your audience. You don't want the audience focusing on a long list of facts and details only to miss your main points.

2. Focus on Clear Main Points

Your audience should be able to discern your main points clearly the first time. You'll outline them in your introduction and they will listen for them as you proceed. Connect supporting information to your clear main points to reinforce them, and provide verbal cues of points covered and points to come.

3. Pace Yourself

Talking too fast is a common expression of speech anxiety. One way to reduce your anxiety level is to practice and know your information well. When you deliver your speech, knowing you have time, are well-prepared, and are familiar with your speech patterns will help you to pace yourself more effectively.

4. Speak with Concern for Clarity

Not everyone speaks English as their first language, and even among English speakers, there is a wide discrepancy in speaking style and language use. When you choose your language, consider challenging terms define them accordingly. As your rate of speech picks up, you may tend to slur words together and drop or de-emphasize consonants, especially at the ends of words. Doing this will make your speech harder to understand and will discourage listening.

5. Use Restatement and Repetition

There is nothing wrong with restating main points or repeating key phrases.

6. Provide Visual Reinforcement

As a speaker giving a prepared presentation, you have the luxury of preparing your visual aids with your audience in mind. Take advantage of the known time frame before your speech to prepare effective visual aids and your speech will be more effective.

7. Include Time for Questions

You can't possibly cover all the information about a topic that every audience member would want to know in the normal five to seven minutes of a speech. In some situations, the speaker will accept and answer questions during the body of the presentations, but it is more typical to ask listeners to hold their questions until the end.

8. Look for Ways to Involve Listeners Actively

Instead of letting your audience sit passively, motivate them to get involved in your presentation. You might ask for a show of hands as you raise a question like, "How many of you have wondered about...?" You might point out the window, encouraging your audience to notice a weather pattern or an example of air pollution. Even stepping away from the podium for a moment can provide variety and increase active listening.

To present a successful informative speech, motivate your audience by making your material relevant and useful, finding interesting ways to frame your topic, and emphasizing new aspects if the topic is a familiar one.

13.5 PREPARING YOUR SPEECH TO INFORM

Now that you've reviewed issues central to the success of your informative speech, there's no doubt you want to get down to work. Here are five final suggestions to help you succeed.

1. Start with What You Know

Regardless of where you draw the inspiration, it's a good strategy to start with what you know and work from there. You'll be more enthusiastic, helping your audience to listen intently, and you'll save yourself time.

2. Consider Your Audience's Prior Knowledge

The audience will want to learn something from you, not hear everything they have heard before. Think about age, gender, and socioeconomic status, as well as your listeners' culture or language.

In the same way, when you prepare a speech in a business situation, do your homework. Access the company website, visit the location and get to know people, and even call members of the company to discuss your topic. The more information you can gather about your audience, the better you will be able to adapt and present an effective speech.

3. Adapting Language and Technical Terms

Define and describe the key terms for your audience as part of your speech and substitute common terms where appropriate. Your audience will enjoy learning more about the topic and appreciate your consideration as you present your speech.

4. Using Outside Information

Even if you think you know everything there is to know about your topic, using outside sources will contribute depth to your speech, provide support for your main points, and even enhance your credibility as a speaker. There is nothing wrong with using outside information as long as you clearly cite your sources and do not present someone else's information as your own.

5. Presenting Information Ethically



Figure 7.1. Presenting information ethically.

A central but often unspoken expectation of the speaker is that we will be ethical. This means, fundamentally, that we perceive one another as human beings with common interests and needs, and that we attend to the needs of others as well as our own. An ethical informative speaker expresses respect for listeners by avoiding prejudiced comments against any group, and by being honest about the information presented, including information that may contradict the speaker's personal biases. The ethical speaker also admits it when they do not know something. The best salesperson recognizes that ethical communication is the key to success, as it builds a healthy relationship where the customer's needs are met, thereby meeting the salesperson's own needs. When presenting information ethically, you must consider the following:

Reciprocity

Reciprocity, or a relationship of mutual exchange and interdependence, is an important characteristic of a relationship, particularly between a speaker and the audience. You as the speaker will have certain expectations and roles, but dominating your audience will not encourage them to fulfill their roles in terms of participation and active listening. Communication involves give and take, and in a public speaking setting, where the communication may be perceived as "all to one," don't forget that the audience is also communicating in terms of feedback with you. You have a responsibility to attend to that feedback, and develop reciprocity with your audience. Without them, you don't have a speech.

Mutuality

Mutuality means that you search for common ground and understanding with the audience, establishing this

space and building on it throughout the speech. This involves examining viewpoints other than your own, and taking steps to insure the speech integrates an inclusive, accessible format, rather than an ethnocentric one.

Nonjudgmentalism

Nonjudgmentalism underlines the need to be open-minded, an expression of one's willingness to examine diverse perspectives. Your audience expects you to state the truth as you perceive it, with supporting and clarifying information to support your position, and to speak honestly. They also expect you to be open to their point of view and be able to negotiate meaning and understanding in a constructive way. Nonjudgmentalism may include taking the perspective that being different is not inherently bad and that there is common ground to be found with each other.

Honesty

Honesty, or truthfulness, directly relates to trust, a cornerstone in the foundation of a relationship with your audience. Without it, the building (the relationship) would fall down. Without trust, a relationship will not open and develop the possibility of mutual understanding. You want to share information and the audience hopefully wants to learn from you. If you only choose the best information to support only your point and ignore contrary or related issues, you may turn your informative speech into a persuasive one with bias as a central feature.

Respect

Respect should be present throughout a speech, demonstrating the speaker's high esteem for the audience. Respect can be defined as an act of giving and displaying particular attention to the value you associate with someone or a group. Displays of respect include making time for conversation, not interrupting, and even giving appropriate eye contact during conversations.

Trust

Communication involves sharing and that requires trust. Trust means the ability to rely on the character or truth of someone, that what you say you mean and your audience knows it. Acknowledging trust and its importance in your relationship with the audience is the first step in focusing on this key characteristic.

Avoid Exploitation

Finally, when we speak ethically, we do not intentionally exploit one another. Exploitation means taking

advantage, using someone else for one's own purposes. Perceiving a relationship with an audience as a means to an end and only focusing on what you get out of it, will lead you to treat people as objects. The temptation to exploit others can be great in business situations, where a promotion, a bonus, or even one's livelihood are at stake.

Suppose you are a bank loan officer. Whenever a customer contacts the bank to inquire about applying for a loan, your job is to provide an informative presentation about the types of loans available, their rates and terms. If you are paid a commission based on the number of loans you make and their amounts and rates, wouldn't you be tempted to encourage them to borrow the maximum amount they can qualify for? Or perhaps to take a loan with confusing terms that will end up costing much more in fees and interest than the customer realizes? After all, these practices are within the law; aren't they just part of the way business is done? If you are an ethical loan officer, you realize you would be exploiting customers if you treated them this way. You know it is more valuable to uphold your long-term relationships with customers than to exploit them so that you can earn a bigger commission.

Consider these ethical principles when preparing and presenting your speech, and you will help address many of these natural expectations of others and develop healthier, more effective speeches.

Sample Informative Presentation

Here is a generic sample speech in outline form with notes and suggestions.

Attention Statement

Show a picture of a goldfish and a tomato and ask the audience, "What do these have in common?"



Introduction

1. Briefly introduce genetically modified foods.
2. State your topic and specific purpose: "My speech today will inform you on genetically modified foods"

that are increasingly part of our food supply.”

3. Introduce your credibility and the topic: “My research on this topic has shown me that our food supply has changed but many people are unaware of the changes.”
4. State your main points: “Today I will define genes, DNA, genome engineering and genetic manipulation, discuss how the technology applies to foods, and provide common examples.”

Body

1. Information. Provide a simple explanation of the genes, DNA and genetic modification in case there are people who do not know about it. Provide clear definitions of key terms.
2. Genes and DNA. Provide arguments by generalization and authority.
3. Genome engineering and genetic manipulation. Provide arguments by analogy, cause, and principle.
4. Case study. In one early experiment, GM (genetically modified) tomatoes were developed with fish genes to make them resistant to cold weather, although this type of tomato was never marketed.
5. Highlight other examples.

Conclusion

1. Reiterate your main points and provide synthesis, but do not introduce new content.
2. State your residual message (what you want to audience to remember most). “Genetically modified foods are more common in our food supply than ever before.”

In preparing an informative speech, use your knowledge and consider the audience’s knowledge, avoid unnecessary jargon, give credit to your sources, and present the information ethically.

13.6 CREATING AN INFORMATIVE PRESENTATION

An informational presentation is common request in business and industry. It's the verbal and visual equivalent of a written report. Informative presentations serve to present specific information for specific audiences for specific goals or functions. Table 7.1 below describes five main parts of a presentation to inform.

Table 7.1. Presentation Components and Their Functions. Lists the five main parts or components of any presentation (McLean, S., 2003).

Component	Function
Attention Statement	Raise interest and motivate the listener
Introduction	Communicate a point and common ground
Body	Address key points
Conclusion	Summarize key points
Residual Message	Communicate central theme, moral of story, or main point

Sample Speech Guidelines

Imagine that you have been assigned to give an informative presentation lasting five to seven minutes. Follow the guidelines in Table 7.2 below and apply them to your presentation.

Table 7.2. Sample speech guidelines. Seven key items.

Topic	Choose a product or service that interests you (if you have the option of choice) and report findings in your speech. Even if you are assigned a topic, find an aspect or angle that is of interest to research.
Purpose	Your general purpose, of course, is to inform. But you need to formulate a more specific purpose statement that expresses a point you have to make about your topic—what you hope to accomplish in your speech.
Audience	Think about what your audience might already know about your topic and what they may not know, and perhaps any attitudes toward or concerns about it. Consider how this may affect the way that you will present your information.
Supporting Materials	Using the information gathered in your search for information, determine what is most worthwhile, interesting, and important to include in your speech. Time limits will require that you be selective about what you use. Use visual aids!
Organization	<ul style="list-style-type: none">• Write a central idea statement that expresses the message, or point, that you hope to get across to your listeners in the speech.• Determine the two to three main points that will be needed to support your central idea.• Finally, prepare a complete sentence outline of the body of the speech. <p>Develop an opening that will</p>
Introduction	<ol style="list-style-type: none">1. get the attention and interest of your listeners,2. express your central idea or message,3. lead into the body of your speech.
Conclusion	The conclusion should review and/or summarize the important ideas in your speech and bring it to a smooth close.
Delivery	The speech should be delivered extemporaneously (not reading but speaking), using speaking notes and not reading from the manuscript. Work on maximum eye contact with your listeners. Use any visual aids or handouts that may be helpful.

Informative presentations illustrate, explain, describe, and instruct the audience on topics and processes.

13.7 CONCLUSION



After reading this chapter, and returning to Dhavit's challenge related to the development of an informational presentation on the environment, how might Dhavit ensure that he communicates his message to best inform his colleagues? How can he help ensure that his presentation is accurate and balanced? How might he avoid injecting his bias or personal opinions into the presentation?

Check your Knowledge



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Additional Resources

Great Canadian Speeches <https://greatcanadianspeeches.ca>

For information on adapting your speech for an audience or audience members with special needs, explore this index of resources compiled by Ithaca College. <http://www.ithaca.edu/wise/disabilities/>

Visit this site for a list informative topics for a business speech. <http://smallbusiness.chron.com/ideas-informative-speech-topics-business-81465.html>

Glossary

Attention Statement – raise interest and motivate the listener.

Bias – an unreasoned or not-well-thought-out judgment.

Body – address key points.

Conclusion – summarize key points.

Describing – using information that requires emphasis on language that is vivid, captures attention, and excites the imagination.

Demonstration – focuses on clearly showing a process and telling the audience important details about each step so that they can imitate, repeat, or do the action themselves.

Exploitation – means taking advantage, using someone else's story or situation for your own purposes.

Exposition – a public exhibition or display, often expressing a complex topic in a way that makes the relationships and content clear.

Honesty – or truthfulness, directly relates to trust, a cornerstone in the foundation of a relationship with your audience.

Informative presentations – focus on helping the audience to understand a topic, issue, or technique more clearly.

Informative report – a speech where you organize your information around key events, discoveries, or technical data and provide context and illustration for your audience.

Interpretation – involves adapting the information to communicate a message, perspective, or agenda.

Introduction – communicate a point and common ground.

Mutuality – means that you search for common ground and understanding with the audience, establishing

this space and building on it throughout the speech.

Nonjudgmentalism – underlines the need to be open-minded, an expression of one's willingness to examine diverse perspectives.

Objectivity – involves expressions and perceptions of facts that are free from distortion by your prejudices, bias, feelings or interpretations.

Reciprocity – a relationship of mutual exchange and interdependence.

Residual message – communicate the central theme or main point.

Respect – defined as an act of giving and displaying particular attention to the value you associate with someone or a group.

Trust – means the ability to rely on the character or truth of someone, that what you say you mean and your audience knows it.

Chapter References

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CHAPTER 14: PRESENTATIONS TO PERSUADE

eCampusOntario

Chapter Learning Objectives

1. Identify and demonstrate how to use six principles of persuasion.
2. Describe similarities and differences between persuasion and motivation.
3. Identify and demonstrate the effective use of five functions of speaking to persuade.
4. Label and discuss three components of an argument.
5. Identify and provide examples of emotional appeals.
6. Demonstrate the importance of ethics as part of the persuasion process.

- 14.1 Introduction
- 14.2 Principles of Persuasion
- 14.3 Presentations that Persuade
- 14.4 Making An Argument
- 14.5 Speaking Ethically and Avoiding Fallacies
- 14.6 Conclusion

14.1 INTRODUCTION

Introduction



Dhavit is passionate about personal health and wellness and is planning on using his knowledge to develop a speech to help persuade some fellow colleagues to stop smoking cigarettes. As you read through this chapter, consider how Dhavit might adapt his planning and delivery to help persuade some of his colleagues to stop smoking.



No doubt there has been a time when you wanted to achieve a goal or convince your manager about a work need and you thought about how you were going to present your request. Consider how often people—including people you have never met and never will meet—want something from you? When you watch television, advertisements reach out for your attention, whether you watch them or not. When you use the Internet, pop-up advertisements often appear. Most people are surrounded, even inundated by persuasive messages. Mass and social media in the 21st century have had a significant effect on persuasive communication that you will certainly recognize. This chapter is about how to communicate with persuasion and how to convince others to consider your point of view.

Chapter Preview

- What is Persuasion?
- Principles of Persuasion
- Persuasive Presentations
- Making an Argument
- Speaking Ethically and Avoiding Fallacies
- Conclusion

14.2 PRINCIPLES OF PERSUASION

Persuasion is an act or process of presenting arguments to move, motivate, or change your audience. Persuasion can be implicit or explicit and can have both positive and negative effects. In this chapter the importance of ethics will continued to be reviewed, especially related to presenting motivational arguments to your audience so that they will consider your points, adopt your view, or change their behavior.

Motivation is different from persuasion in that it involves the force, stimulus, or influence to bring about change. Persuasion is the process, and motivation is the compelling stimulus that encourages your audience to change their beliefs or behaviour, to adopt your position, or to consider your arguments.



Principles of Persuasion

What is the best way to succeed in persuading your listeners? There is no one “correct” answer, but many experts have studied persuasion and observed what works and what doesn’t. Social psychologist Robert Cialdini (2006) offers us six principles of persuasion that are powerful and effective:

1. Reciprocity
2. Scarcity
3. Authority
4. Commitment and consistency
5. Consensus
6. Liking



Reciprocity

Reciprocity is the mutual expectation for exchange of value or service. In all cultures, when one person gives something, the receiver is expected to reciprocate. If you are in customer service and go out of your way to meet the customer's need, you are appealing to the principle of reciprocity with the knowledge that all humans perceive the need to reciprocate—in this case, by increasing the likelihood of making a purchase from you because you were especially helpful. Reciprocity builds trust and the relationship develops, reinforcing everything from personal to brand loyalty. By taking the lead and giving, you build in a moment where people will feel compelled from social norms and customs to give back.



Scarcity

You want what you can't have, and it's universal. People are naturally attracted to the exclusive, the rare, the unusual, and the unique. If they are convinced that they need to act now or it will disappear, they are motivated to action. Scarcity is the perception of inadequate supply or a limited resource. For a sales representative, scarcity may be a key selling point—the particular car, or theater tickets, or pair of shoes you are considering may be sold to someone else if you delay making a decision. By reminding customers not only of what they stand to gain but also of what they stand to lose, the representative increases the chances that the customer will make the shift from contemplation to action and decide to close the sale.



Authority

Trust is central to the purchase decision. Whom does a customer turn to? A salesperson may be part of the process, but an endorsement by an authority holds credibility that no one with a vested interest can ever attain. Knowledge of a product, field, trends in the field, and even research can make a salesperson more effective by the appeal to the principle of authority. It may seem like extra work to educate your customers, but you need to reveal your expertise to gain credibility. Reading the manual of a product is not sufficient to gain expertise—you have to do extra homework. The principle of authority involves referencing experts and expertise.



Commitment and Consistency

People like to have consistency in what is said to them or in writing. Therefore, it is important that all commitments made are honored at all times.



Consensus

Testimonials, or first person reports on experience with a product or service, can be highly persuasive. People often look to each other when making a purchase decision, and the herd mentality is a powerful force across

humanity. Leverage testimonials from clients to attract more clients by making them part of your team. The principle of consensus involves the tendency of the individual to follow the lead of the group or peers.



Liking

We tend to be attracted to people who communicate to us that they like us, and who make us feel good about ourselves. Given a choice, these are the people with whom we are likely to associate. The principle of liking involves the perception of safety and belonging in communication.

To summarize, a persuasive message can succeed through the principles of reciprocity, scarcity, authority, commitment and consistency, consensus, and liking.

Watch the following 12 minute RSA animated video; *The Science of Persuasion*

[https://www.youtube.com/watch?v=cFdCzN7RYbw\[/embed\]](https://www.youtube.com/watch?v=cFdCzN7RYbw[/embed])

14.3 PRESENTATIONS THAT PERSUADE

Persuasive presentations have the following features, they:



Stimulate

When you focus on stimulation as the goal of your speech, you want to reinforce existing beliefs, intensify them, and bring them to the forefront. By presenting facts, you will reinforce existing beliefs, intensify them, and bring the issue to the surface. You might consider the foundation of common ground and commonly held beliefs, and then introduce information that a mainstream audience may not be aware of that supports that common ground as a strategy to stimulate.



Convince

In a persuasive speech, the goal is to change the attitudes, beliefs, values, or judgments of your audience. If we look back at the idea of motive, in this speech the prosecuting attorney would try to convince the jury members that the defendant is guilty beyond reasonable doubt. He or she may discuss motive, present facts, all with the goal to convince the jury to believe or find that his or her position is true.

Audience members will also hold beliefs and are likely to involve their own personal bias. Your goal is to get them to agree with your position, so you will need to plan a range of points and examples to get audience members to consider your topic.



Include a Call to Action

Figure 8.1 below shows the “Reduce, reuse, recycle, repeat” slogan. The recycle movement is one of the most successful and persuasive call to action campaigns of the past twenty or more years in Canada (Babooram & Wang, 2007).



Figure 8.1. Reduce, reuse, recycle, repeat slogan.

“Reduce-reuse-recycle-repeat” by Phil Gibbs is shared with a CC BY 2.0 Generic license

When you call an audience to action with a speech, you are indicating that your purpose is not to stimulate interest, reinforce and accentuate beliefs, or convince them of a viewpoint. Instead, you want your listeners to do something, to change their behaviour in some way.

If you were a showroom salesperson at Toyota for example, you might include the concept that the purchase of a Prius hybrid model is a call to action against issues of global warming related to fossil fuel consumption. The economics, even at current gas prices, might not completely justify the difference in price between a hybrid and a non-hybrid car. However, if you as a salesperson can make a convincing argument that choosing a hybrid car is the right and responsible decision, you may be more likely to get the customer to act. The persuasive speech that focuses on action often generates curiosity, clarifies a problem, and as we have seen, proposes a range of solutions. The key difference here is there is a clear link to action associated with the solutions.

Solutions lead us to considering the goals of action. These goals address the question, “What do I want

the audience to do as a result of being engaged by my speech?” The goals of action include adoption, discontinuance, deterrence, and continuance.

Adoption means the speaker wants to persuade the audience to take on a new way of thinking, or adopt a new idea. Examples could include buying a new product, or deciding to donate blood. The key is that the audience member adopts, or takes on, a new view, action, or habit.

Discontinuance involves the speaker persuading the audience to stop doing something what they have been doing. Rather than take on a new habit or action, the speaker is asking the audience member to stop an existing behaviour or idea.

Deterrence is a call to action that focuses on persuading the audience not to start something if they haven’t already started. The goal of action would be to deter, or encourage the audience members to refrain from starting or initiating the behavior.

Finally, with **continuance**, the speaker aims to persuade the audience to continue doing what they have been doing, such as keep buying a product, or staying in school to get an education.

A speaker may choose to address more than one of these goals of action, depending on the audience analysis. If the audience is largely agreeable and supportive, you may find continuance to be one goal, while adoption is secondary.

Goals in call to action speeches serve to guide you in the development of solution steps. Solution steps involve suggestions or ways the audience can take action after your speech. Audience members appreciate a clear discussion of the problem in a persuasive speech, but they also appreciate solutions.

Increase Consideration

In a speech designed to increase consideration, you want to entice your audience to consider alternate viewpoints on the topic you have chosen. Audience members may hold views that are hostile in relation to yours, or perhaps they are neutral and simply curious about your topic. Returning to the Toyota salesperson example, you might be able to compare and contrast competing cars and show that the costs over ten years are quite similar. But the Prius has additional features that are the equivalent of a bonus, including high gas mileage. You might describe tax incentives for ownership, maintenance schedules and costs, and resale value. Your arguments and their support aim at increasing the audience’s consideration of your position. You won’t be asking for action in this presentation, but a corresponding increase of consideration may lead the customer to that point at a later date.

Develop Tolerance of Alternate Perspectives

Finally, you may want to help your audience develop tolerance of alternate perspectives and viewpoints. Perhaps your audience, as in the previous example, is interested in purchasing a car and you are the lead salesperson on that model. As you listen, and do your informal audience analysis, you may learn that

horsepower and speed are important values to this customer. You might raise the issue of torque versus horsepower and indicate that the “uumph” you feel as you start a car off the line is torque. Many hybrid and even electric vehicles have great torque, as their systems involve fewer parts and less friction than a corresponding internal combustion-transaxle system. Your goal is to help your audience develop tolerance, but not necessarily acceptance, of alternate perspectives. By starting from common ground, and introducing a related idea, you are persuading your audience to consider an alternate perspective.

A persuasive speech may stimulate thought, convince, call to action, increase consideration, or develop tolerance of alternate perspectives.

14.4 MAKING AN ARGUMENT

When people argue, they are engaged in conflict and it's usually not pretty. It sometimes appears that way because people resort to fallacious arguments or false statements, or they simply do not treat each other with respect. They get defensive, try to prove their own points, and fail to listen to each other.

But this should not be what happens in persuasive argument. Instead, when you make an argument in a persuasive speech, you will want to present your position with logical points, supporting each point with appropriate sources. You will want to give your audience every reason to perceive you as an ethical and trustworthy speaker. Your audience will expect you to treat them with respect, and to present your argument in way that does not make them defensive. Contribute to your credibility by building sound arguments and using strategic arguments with skill and planning.

Stephen Toulmin's (1958) rhetorical strategy focuses on three main elements, shown in Table 8.1 as claim, data, and warrant.

Table 8.1 Rhetorical strategy.

Element	Description	Example
Claim	Your statement of belief or truth	It is important to spay or neuter your pet.
Data	Your supporting reasons for the claim	Millions of unwanted pets are euthanized annually.
Warrant	You create the connection between the claim and the supporting reasons	Pets that are spayed or neutered do not reproduce, preventing the production of unwanted animals.

This three-part rhetorical strategy is useful in that it makes the claim explicit, clearly illustrating the relationship between the claim and the data, and allows the listener to follow the speaker's reasoning. You may have a good idea or point, but your audience will be curious and want to know how you arrived at that claim or viewpoint. The warrant often addresses the inherent and often unspoken question, "Why is this data so important to your topic?" and helps you illustrate relationships between information for your audience. This model can help you clearly articulate it for your audience.

Appealing to Emotions

Emotions are a psychological and physical reaction, such as fear or anger, to stimuli that we experience as a

feeling. Our feelings or emotions directly impact our own point of view and readiness to communicate, but also influence how, why, and when we say things. Emotions influence not only how you say what you say, but also how you hear and what you hear. At times, emotions can be challenging to control. Emotions will move your audience, and possibly even move you, to change or act in certain ways.



Be wary of overusing emotional appeals, or misusing emotional manipulation in presentations and communication. You may encounter emotional resistance from your audience. Emotional resistance involves getting tired, often to the point of rejection, of hearing messages that attempt to elicit an emotional response. Emotional appeals can wear out the audience's capacity to receive the message.

The use of an emotional appeal may also impair your ability to write persuasively or effectively. Never use a personal story, or even a story of someone you do not know, if the inclusion of that story causes you to lose control. While it's important to discuss relevant and sometimes emotionally difficult topics, you need to assess your own relationship to the message. Your documents should not be an exercise in therapy and you will sacrifice ethos and credibility, even your effectiveness, if you become angry or distraught because you are really not ready to discuss an issue you've selected.

Now that you've considered emotions and their role in a speech in general and a speech to persuade specifically, it's important to recognize the principles about emotions in communication that serve you well when speaking in public. DeVito (2003) offers five key principles to acknowledge the role emotions play in communication and offer guidelines for their expression.

Emotions Are Universal

Emotions are a part of every conversation or interaction that you have. Whether or not you consciously experience them while communicating with yourself or others, they influence how you communicate. By recognizing that emotions are a component in all communication interactions, you can place emphasis on understanding both the content of the message and the emotions that influence how, why, and when the content is communicated.

Expression of emotions is important, but requires the three Ts: tact, timing, and trust. If you find you are upset and at risk of being less than diplomatic, or the timing is not right, or you are unsure about the level of trust, then consider whether you can effectively communicate your emotions. By considering these three Ts, you can help yourself express your emotions more effectively.

Emotions Are Communicated Verbally and Nonverbally

You communicate emotions not only through your choice of words but also through the manner in which you say those words. The words themselves communicate part of your message, but the nonverbal cues, including inflection, timing, space, and paralanguage can modify or contradict your spoken message. Be aware that emotions are expressed in both ways and pay attention to how verbal and nonverbal messages reinforce and complement each other.

Emotional Expression Can Be Good and Bad

Expressing emotions can be a healthy activity for a relationship and build trust. It can also break down trust if expression is not combined with judgment. We're all different, and we all experience emotions, but how we express our emotions to ourselves and others can have a significant impact on our relationships. Expressing frustrations may help the audience realize your point of view and see things as they have never seen them before. However, expressing frustrations combined with blaming can generate defensiveness and decrease effective listening. When you're expressing yourself, consider the audience's point of view, be specific about your concerns, and emphasize that your relationship with your listeners is important to you.

Emotions Are Often Contagious

It is important to recognize that we influence each other with our emotions, positively and negatively. Your emotions as the speaker can be contagious, so use your enthusiasm to raise the level of interest in your topic. Conversely, you may be subject to "catching" emotions from your audience.

In summary, everyone experiences emotions, and as a persuasive speaker, you can choose how to express emotion and appeal to the audience's emotions.

Elevator Speech

An elevator speech is to oral communication what a Twitter message (limited to 140 characters) is to written communication. An elevator speech is a presentation that persuades the listener in less than thirty seconds, or around a hundred words.

Creating an Elevator Speech

An elevator speech does not have to be a formal event, though it can be. An elevator speech is not a full sales pitch and should not get bloated with too much information. The idea is not to rattle off as much information as possible in a short time, nor to present a memorized thirty-second advertising message, but rather to give a relaxed and genuine “nutshell” summary of one main idea. The emphasis is on brevity, but a good elevator speech will address several key questions:

1. What is the topic, product or service?
2. Who are you?
3. Who is the target market? (if applicable)
4. What is the revenue model? (if applicable)
5. What or who is the competition and what are your advantages?

The following are the five key parts of your message:

- Attention Statement – Hook + information about you
- Introduction – What you offer
- Body – Benefits; what’s in it for the listener
- Conclusion – Example that sums it up
- Residual Message – Call for action

Example:

Person you’ve just met: How are you doing?

You: I’m great, how are you? [ensure that your conversation partner feels the conversation is a two-way street and that they might be interested in hearing your elevator speech]

Person you’ve just met: Very well thanks, what brings you to this conference?

You: Glad you asked. I’m with (X Company) and we just received this new (product x)—it is amazing. It beats the competition hands down for a third of the price. Smaller, faster, and less expensive make it a winner. It’s already a sales leader. Hey, if you know anyone who might be interested, call me! (Hands business card to the listener as visual aid). So what brings you to this conference? [be a good listener]

You often don't know when opportunity to inform or persuade will present itself, but with an elevator speech, you are prepared!

14.5 SPEAKING ETHICALLY AND AVOIDING FALLACIES



What comes to mind when you think of speaking to persuade? Perhaps the idea of persuasion may bring to mind propaganda and issues of manipulation, deception, intentional bias, bribery, and even coercion. Each element relates to persuasion, but in distinct ways. We can recognize that each of these elements in some ways has a negative connotation associated with it. Why do you think that deceiving your audience, bribing a judge, or coercing people to do something against their wishes is wrong? These tactics violate our sense of fairness, freedom, and ethics.

Manipulation involves the management of facts, ideas or points of view to play upon inherent insecurities or emotional appeals to one's own advantage. Your audience expects you to treat them with respect, and deliberately manipulating them by means of fear, guilt, duty, or a relationship is unethical.

In the same way, **deception** involves the use of lies, partial truths, or the omission of relevant information to deceive your audience. No one likes to be lied to, or made to believe something that is not true. Deception can involve intentional bias, or the selection of information to support your position while framing negatively any information that might challenge your belief.

Bribery involves the giving of something in return for an expected favour, consideration, or privilege. It circumvents the normal protocol for personal gain, and again is a strategy that misleads your audience.

Coercion is the use of power to compel action. You make someone do something they would not choose to do freely. While you may raise the issue that the ends justify the means, and you are “doing it for the audience’s own good,” recognize the unethical nature of coercion.

Eleven Points for Speaking Ethically

In his book *Ethics in Human Communication* Johannesen (1996) offers eleven points to consider when speaking to persuade. His main points reiterate many of the points across this chapter and should be kept in mind as you prepare, and present, your persuasive message.

Do not:

- use false, fabricated, misrepresented, distorted or irrelevant evidence to support arguments or claims
- intentionally use unsupported, misleading, or illogical reasoning
- represent yourself as informed or an “expert” on a subject when you are not
- use irrelevant appeals to divert attention from the issue at hand
- ask your audience to link your idea or proposal to emotion-laden values, motives, or goals to which it is actually not related
- deceive your audience by concealing your real purpose, by concealing self-interest, by concealing the group you represent, or by concealing your position as an advocate of a viewpoint
- distort, hide, or misrepresent the number, scope, intensity, or undesirable features of consequences or effects
- use “emotional appeals” that lack a supporting basis of evidence or reasoning.
- oversimplify complex, gradation-laden situations into simplistic, two-valued, either-or, polar views or choices
- pretend certainty where tentativeness and degrees of probability would be more accurate
- advocate something which you yourself do not believe in

In your speech to persuade, consider honesty and integrity as you assemble your arguments. Your audience will appreciate your thoughtful consideration of more than one view, your understanding of the complexity, and you will build your ethos, or credibility, as you present your document. Be careful not to stretch the facts, or assemble them only to prove yourself, and instead prove the argument on its own merits. Deception, coercion, intentional bias, manipulation and bribery should have no place in your speech to persuade.

Avoiding Fallacies

Fallacies are another way of saying false logic. These tricks deceive your audience with their style, drama, or pattern, but add little to your speech in terms of substance and can actually detract from your effectiveness. In Table 8.2 below, eight classical fallacies are described. Learn to recognize these fallacies so they can't be used against you, and so that you can avoid using them with your audience.

Table 8.2 Eight fallacies

Fallacy	Definition	Example
1. Red Herring	Any diversion intended to distract attention from the main issue, particularly by relating the issue to a common fear.	It's not just about the death penalty; it's about the victims and their rights. You wouldn't want to be a victim, but if you were, you'd want justice.
2. Straw Man	A weak argument set up to be easily refuted, distracting attention from stronger arguments	What if we released criminals who commit murder after just a few years of rehabilitation? Think of how unsafe our streets would be then!
3. Begging the Question	Claiming the truth of the very matter in question, as if it were already an obvious conclusion.	We know that they will be released and unleashed on society to repeat their crimes again and again.
4. Circular Argument	The proposition is used to prove itself. Assumes the very thing it aims to prove. Related to begging the question.	Once a killer, always a killer.
5. Ad Populum	Appeals to a common belief of some people, often prejudicial, and states everyone holds this belief. Also called the Bandwagon Fallacy, as people "jump on the bandwagon" of a perceived popular view.	Most people would prefer to get rid of a few "bad apples" and keep our streets safe.
6. Ad Hominem	"Argument against the man" instead of against his message. Stating that someone's argument is wrong solely because of something about the person rather than about the argument itself.	Our representative is a drunk and philanderer. How can we trust him on the issues of safety and family?
7. Non Sequitur	"It does not follow." The conclusion does not follow from the premises. They are not related.	Since the liberal anti-war demonstrations of the 1960s, we've seen an increase in convicts who got let off death row.
8. Post Hoc Ergo Propter Hoc	"After this, therefore because of this," also called a coincidental correlation. It tries to establish a cause-and-effect relationship where only a correlation exists.	Violent death rates went down once they started publicizing executions.

Avoid false logic and make a strong case or argument for your proposition. Finally, here is a five-step motivational checklist to keep in mind as you bring it all together:

1. Get their attention
2. Identify the need

3. Satisfy the need
4. Present a vision or solution
5. Take action

This simple organizational pattern can help you focus on the basic elements of a persuasive message when time is short and your performance is critical. Speaking to persuade should not involve manipulation, coercion, false logic, or other unethical techniques.

14.6 CONCLUSION



After reading this chapter, and returning to Dhavit's challenge related to creating a persuasive presentation, how might Dhavit plan and deliver his information to help persuade some of his colleagues to stop smoking?

Check Your Understanding



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Additional Resources

Justthink.org promotes critical thinking skills and awareness of the impact of images in the media among young people. http://www.change.org/organizations/just_think_foundation

Visit this site for a video and other resources about Maslow's hierarchy of needs. http://www.abraham-maslow.com/m_motivation/Hierarchy_of_Needs.asp

Read an informative article on negotiating face-to-face across cultures by Stella Ting-Toomey, https://www.sfu.ca/davidlamcentre/forum/past_PRF/PRF_1999/intercultural-conflict-competence-eastern-and-western-lenses.html

Purdue University's Online Writing Lab (OWL) provides a guide to persuasive speaking strategies. <http://owl.english.purdue.edu/owl/resource/588/04>

Visit the CBC Podcasts page and assess the persuasive message of various programs. <http://www.cbc.ca/radio/podcasts/>

Glossary

Adoption – means the speaker wants to persuade the audience to take on a new way of thinking, or adopt a new idea.

Authority – involves referencing experts and expertise.

Bribery – involves the giving of something in return for an expected favour, consideration, or privilege.

Call to action – you want your listeners to do something, to change their behaviour in some way.

Claim – your statement of belief or truth when making an evidence-based argument.

Coercion – the use of power to compel action.

Commitment and Consistency – means ensuring that you follow through on what you say you will do.

Consensus – is the tendency of the individual to follow the lead of the group or peers.

Continuance – the speaker aims to persuade the audience to continue doing what they have been doing, such as keep buying a product, or staying in school to get an education.

Data – your supporting reasons for a claim when you are making an evidence-based argument.

Deception – involves the use of lies, partial truths, or the omission of relevant information to deceive your audience.

Deterrence – call to action that focuses on persuading audience not to start something if they haven't already started.

Discontinuance – involves the speaker persuading the audience to stop doing something they have been doing.

Fallacies – another way of saying false logic. These tricks deceive your audience with their style, drama, or pattern, but add little to your speech in terms of substance and can actually detract from your effectiveness.

Goals of action (solutions) – include adoption, discontinuance, deterrence, and continuance.

Liking – involves the perception of safety and belonging in communication.

Manipulation – involves the management of facts, ideas or points of view to play upon inherent insecurities or emotional appeals to one's own advantage.

Motivation – different from persuasion in that it involves the force, stimulus, or influence to bring about change.

Persuasion – an act or process of presenting arguments to move, motivate, or change your audience.

Reciprocity – is the mutual expectation for exchange of value or service.

Scarcity – is the perception of inadequate supply or a limited resource.

Stimulation – reinforce existing beliefs, intensify them, and bring them to the forefront.

Warrant – you create the connection between a claim and supporting reasons when making an evidence-based argument.

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PART VI

APPENDIX A: VISUAL COMMUNICATION

Acknowledgments

Appendix A is reproduced from the following text:

Ashman, M. (2018). Introduction to Professional Communications. eCampus Ontario/Pressbooks.

A.1 USING GRAPHICS

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

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

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

Documenting graphics

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

Guidelines for using graphics

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

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

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

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

Use titles and labels for graphics.

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

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

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A.2 DRAWINGS, DIAGRAMS, AND PHOTOS

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

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

Formatting requirements

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

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

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

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

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

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

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

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

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any illustrations, diagrams, and photos that you use that were created by someone else or that were based on

someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

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A.3 TABLES, CHARTS, AND GRAPHS

Tables

Uses for tables

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

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

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

Formatting requirements

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

Table 3. Energy production by major source from 1960 to 1980 ¹					
Year	Total production (quad Btu)	Percent production			
		Coal	Petroleum	Natural gas	Other ²
1960	41.5	26.1	36.0	34.0	3.9
1970	62.1	23.5	32.9	38.9	4.7
1980	64.8	28.7	28.2	34.2	8.9

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

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

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

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

Guidelines for using tables

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

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

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

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

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

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

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

Charts and graphs

Uses of charts and graphs

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

Formatting requirements

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

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

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

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

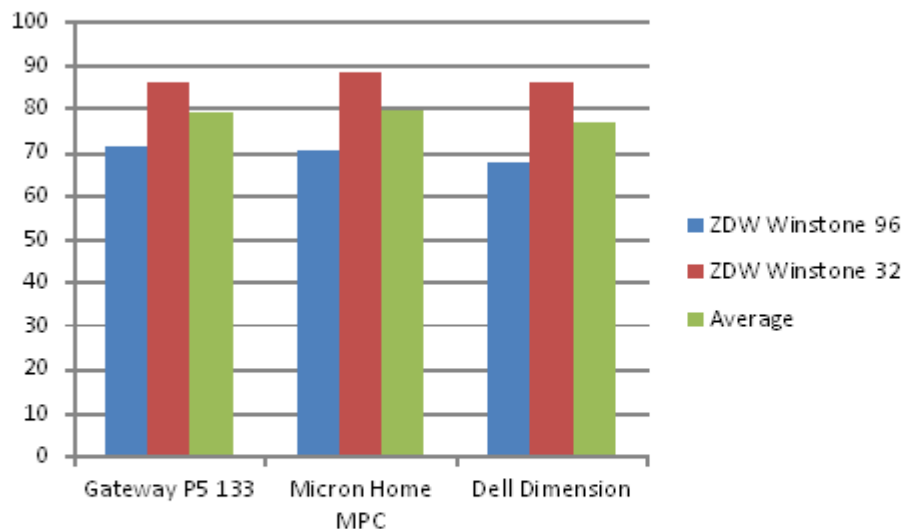


Figure 5. Benchmark ratings of system performance [1:116-118]

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

Figure 5.3.2 Example of a chart

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

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

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A.4 HEADINGS

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

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

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

General guidelines

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

- Make the phrasing of headings parallel.

- Avoid “stacked” headings—any two consecutive headings without intervening text.

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

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

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

Format and style

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

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

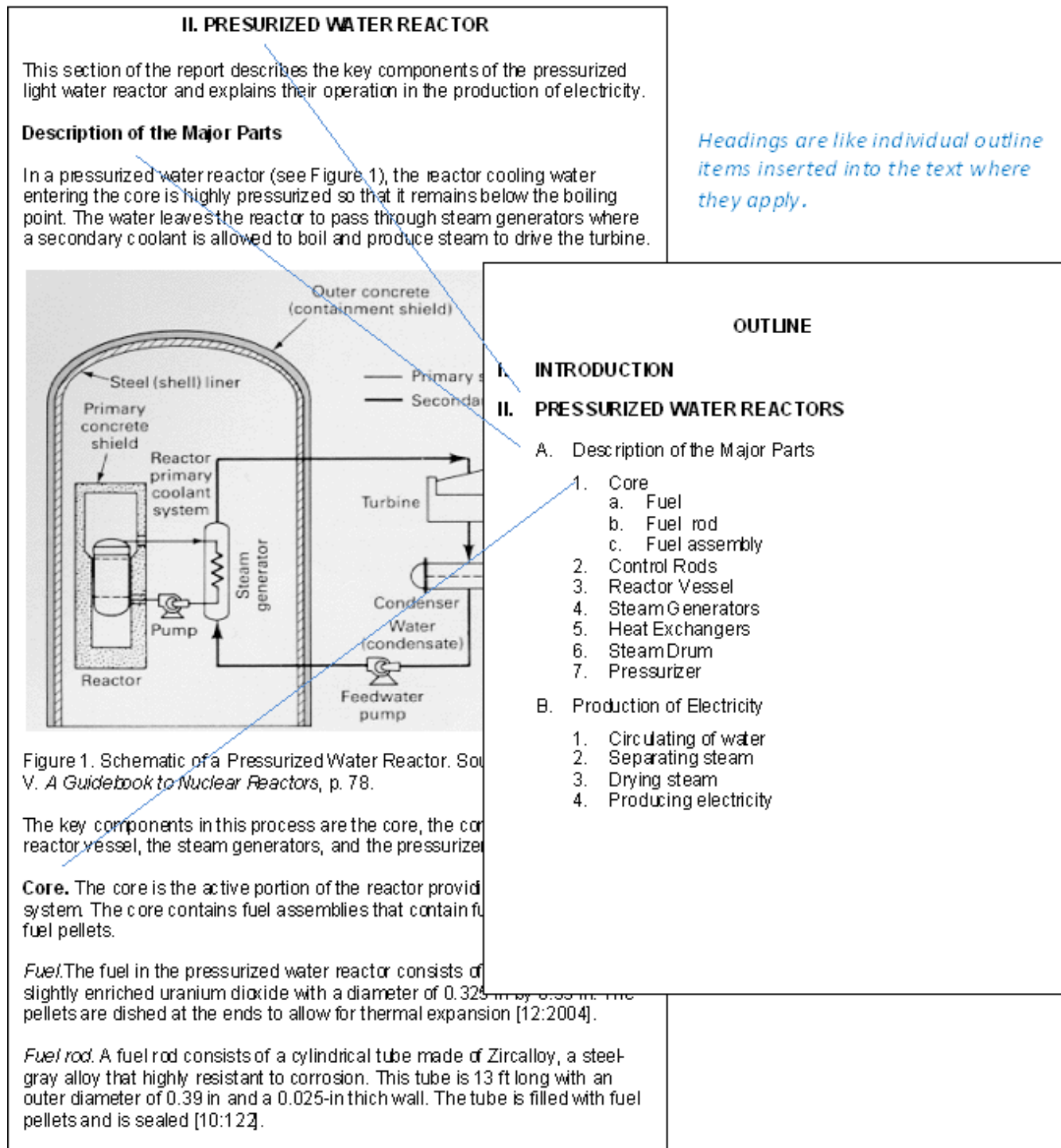


Figure 5.4.1 Comparing document headings to an outline

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

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

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

Attribution

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A.5 LISTS

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

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

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

General guidelines

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

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

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

Make list items parallel in phrasing.

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

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

Horizontal lists

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

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

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

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

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

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

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

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

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

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

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

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

Vertical lists

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

Avoid using headings as lead-ins for lists.

Use consistent spacing, indentation, and punctuation.

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

5. Select the **Save preview picture** check box.
6. Click **OK** to close the dialogue box.

Notice that this note is indented to the text of the parent list item.

Note: Keep the properties window open for the next exercise.

Figure 5.5.1 Indented material that elaborates on the parent list item

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

Use sentence-style capitalization on list items.

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

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

A word of caution

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

Attribution

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A.6 EMPHASIS

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

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

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

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PART VII

APPENDIX B: WORK-INTEGRATED LEARNING RESOURCES

Work Integrated Learning Open Module Initiative

Work Integrated Learning (WIL) has become a core element of post-secondary instruction and a crucial means by which applied and experiential learning is infused into curriculum in highly meaningful and professionally relevant ways. **This comprehensive set of open access, learner-centered modules supports WIL preparedness among post-secondary students and has been included in this OER to compliment existing units and chapters.**

These modules are grounded in The Higher Education Quality Council of Ontario's (HEQCO) *Practical Guide for Work Integrated Learning* and represent over 35 hours of rich content that can be used by students, faculty, career-services staff, and employers to support student learning in applied and work-integrated settings.



All modules created for the *Work Integrated Learning Open Module Initiative* by Niagara College, Georgian College, Lambton College and Algonquin College are licensed under the Creative Commons Attribution Non-Commercial 4.0 International License, except where otherwise noted.

Please Note:

Select modules from the WIL initiative have been included in this textbook. For the full range of available WIL modules and/or for facilitator resources and files, please visit the Work Integrated Learning Open Module Initiative website from Niagara College.

B.1 WORKPLACE COMMUNICATION MODULES

Workplace and Research Communication Modules

These *Workplace Communication Skills* modules support learners in building the practical skills necessary to communicate effectively in work integrated learning (WIL) situations. Content and activities help learners to select appropriate research strategies and prepare effective business communications, including writing emails, memos, and presentations.



A note about accessibility: these are web-based interactive modules that contain audio and video. The modules incorporate a variety of accessibility features compatible with assistive technology, including full transcripts and synchronized closed captioning of all audio content.

B 1.1 Professional Communication

This module includes content and activities that will support participants in communicating professionally in the workplace. Participants will explore how they can most effectively demonstrate and maintain professionalism in their verbal, non-verbal, and written exchanges.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.2/>

B 1.2 Writing Emails and Memos

This module includes content and activities that will help participants develop a comprehensive resume and references page that effectively highlights their academic and professional experiences and is tailored to their chosen field.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.3/>

B 1.3 Research Skills

This module includes content and activities that will support participants in selecting and applying appropriate research skills for a given workplace or WIL task.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.1/>

B 2.4 Giving Effective Presentations

This module includes content and activities that will support participants in delivering presentations that are engaging, visually appealing, and effectively communicate key data, plans and ideas.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.4/>

B.2 EMPLOYMENT COMMUNICATION MODULES

JOB SEARCH SKILLS

These *Job Search Skills* modules support learners in identifying their work integrated learning (WIL) requirements and finding relevant opportunities in their field. Key employability and networking skills are introduced and are applied to the development of effective resumes, references, and cover letters.



A note about accessibility: these are web-based interactive modules that contain audio and video. The modules incorporate a variety of accessibility features compatible with assistive technology, including full transcripts and synchronized closed captioning of all audio content.

B 2.1 Finding and Evaluating Job Opportunities

This module will assist participants to refine basic skills in seeking and assessing job opportunities as they prepare for WIL experiences.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.1/>

B 2.2 Employability and Transferable Skills

This module includes content and activities that will introduce participants to key employability skills that are highly sought-after by employers. Participants will reflect upon and critically assess their existing employability skills and will review strategies for further developing and refining them.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.2/>

B 2.3 Writing a Resume and Reference Page

This module includes content and activities that will help participants develop a comprehensive resume and references page that effectively highlights their academic and professional experiences and is tailored to their chosen field.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.3/>

B 2.4 Writing a Cover Letter

This module includes content and activities that will help participants develop an effective cover letter that effectively highlights their academic and professional experiences and is tailored to a specific job or placement opportunity.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.4/>

B.3 INTERPERSONAL AND GROUP COMMUNICATION MODULES

INTERPERSONAL AND GROUP COMMUNICATION

These *interpersonal communications* modules introduce learners to concepts and approaches that will enable them to work effectively with others in their work integrated learning (WIL) experiences. Module content and activities focus on teamwork, interpersonal communication, intercultural communication, and networking strategies.



A note about accessibility: these are web-based interactive modules that contain audio and video. The modules incorporate a variety of accessibility features compatible with assistive technology, including full transcripts and synchronized closed captioning of all audio content.

B 3.1 Interpersonal Communication

This module includes content and activities that will support participants in communicating effectively with their colleagues and clients face-to-face in WIL experiences.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.1/>

B 3.2 Intercultural Communication

This module includes content and activities that will introduce participants to key employability skills that are highly sought-after by employers. Participants will reflect upon and critically assess their existing employability skills and will review strategies for further developing and refining them.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.2/>

B 3.3 Teamwork

This module includes content and activities that will support participants in communicating respectfully and working productively in teams in the workplace.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.3/>

B 3.4 Networking Strategies

This module includes content and activities that will help participants assess their existing professional and academic networks and consider strategies for making new connections, including face-to-face and social media approaches.

- **Playable File:** <https://www.niagaracollege.ca/modules/WIL2018/2.5/>

ANCILLARY RESOURCES

Ancillary Resources

File Downloads

- Download the Table of Contents for this text in PDF.
- Download the unit learning outcomes and chapter learning objectives for this text in PDF.

PowerPoint Slide Samples

- Chapter 1: Professional Communications
- Chapter 2: The Writing Process I: Preparing

VERSION HISTORY

This page provides a record of edits and changes made to this book since its initial publication. Whenever edits or updates are made in the text, we provide a record and description of those changes here. If the change is minor, the version number increases by 0.1. If the edits involve a number of changes, the version number increases to the next full number.

The files posted alongside this book always reflect the most recent version.

Version	Date	Change	Affected Web Page
1.0	19 August 2019	First publication	N/A