NSCC Communication Skills for Trades

NSCC COMMUNICATION SKILLS FOR TRADES

NSCC EDITION

NSCC

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NSCC Communication Skills for Trades is an adapted remixed version of *Communication @ Work* by Jordan Smith, with additional content added from: *Professional Communications: A Common Approach to Workplace Writing*; *Technical Writing Essentials: Introduction to Professional Communications in Technical Fields; Making Conflict Suck Less: The Basics*; and *Communicating and Mentoring in the Trades.*

CONTENTS

ABOUT THIS BOOK

NSCC Communications Skills for Trades was created for students studying in trades programs at NSCC. This new work focuses on the skills required for successful communication in the workplace.

It is an adapted work based primarily on Communication Skills: NSCC Edition by Jordan Smith and NSCC with additional content remixed from several other open textbooks:

- Professional Communications by Jordan Smith, Melissa Ashman, eCampusOntario, Brian Dunphy, and Andrew Stracuzzi
- Technical Writing Essentials by Suzan Last
- Making Conflict Suck Less: The Basics by ashleyorme
- Communication and Mentoring in the Trades by Tim Carson.

For a more complete adaptation statement, see the revision history chapter at the end of this book.

CHAPTER 1: PROFESSIONAL COMMUNICATIONS

OVERVIEW

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[1]

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.

1. (Conference Board, n.d.a)

1.1 INTRODUCTION

JORDAN SMITH

Learning Objective

Learn what is required for good communication.

In our increasingly technological and internationalized workplaces, communications skills are among the most sought-after competencies employers require of job candidates. Every job posting you see will almost certainly ask for candidates with **excellent communications skills** and the ability to **work effectively in teams**. The ability to communicate clearly and effectively in written, verbal, visual, and interpersonal contexts is vital for success and advancement in the workplace.

No matter how brilliant or innovative an idea may be, if it is not communicated clearly and promoted effectively to the right audience, it will not become a reality. For an innovative idea to move from concept to project to completion requires many stages in a design process (see **Figure 1**), almost all of which require clear communication and effective teamwork.

Figure 1 *Phases of a project and some accompanying communications tasks.*[1] [Image Long Description]

If the design and implementation teams cannot work and communicate effectively with each other, their final product will fail to meet its potential.

Technical Writing Essentials introduces the key elements of professional style, document design, collaboration, oral presentation, and research skills needed to design productive workplace documents and presentations for a variety of purposes and audiences.

1.

1.2 COMMUNICATING IN THE DIGITAL AGE

Learning Objectives

After studying this unit, you will be able to

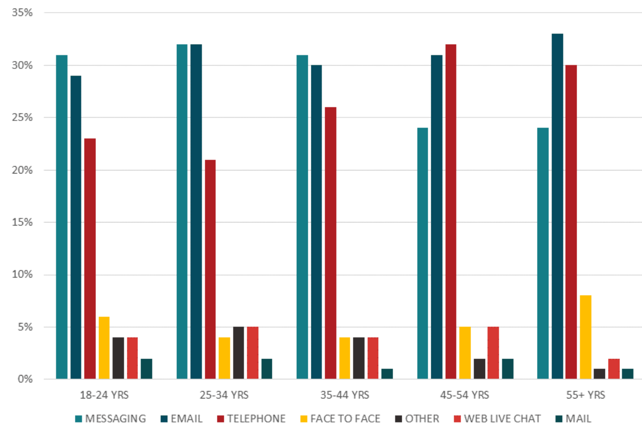
- distinguish between personal and professional uses of communication technologies in ways that ensure career success and personal health

INTRODUCTION

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 "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 1.1: 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. Add to that the psychological and physiological impacts of adults averaging 8.8 hours of screen time per day[1], 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

1. (Dunckley, 2014; Twenge, 2017; Nielsen, 2016, p. 4)

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 reaching 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. Review the following video for an overview of how technology and other trends are shaping the workplace of the future.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=26#h5p-1

Key Takeaway

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

After studying this unit, you will be able to

- illustrate the 5 step communication process
- explain the end goal of communication
- explain barriers to clear communication

PRE-LEARNING – DR. GUFFEY'S LISTENING QUIZ

How good are you at listening? Take the Dr Guffy interactive quiz.

The quiz enables you to quickly compare your own listening behaviours with behaviours normally thought to be associated with exceptionally good listening skills

INTRODUCTION

Good communication skills are essential to effective business communications. At its core, the aim of communication is to transmit information from one person to another so that the **sender** and **receiver** understand the **message** in the same way. The responsibility for clear communication usually falls on the sender. But the receiver is also responsible to confirm a clear understanding of the message. Communication is a dynamic and cyclical process.

Breaking down the communication cycle into its parts is helpful to understand the responsibilities of both the sender and receiver of communication, as well as to identify communication barriers.

THE 5 STEP COMMUNICATION PROCESS

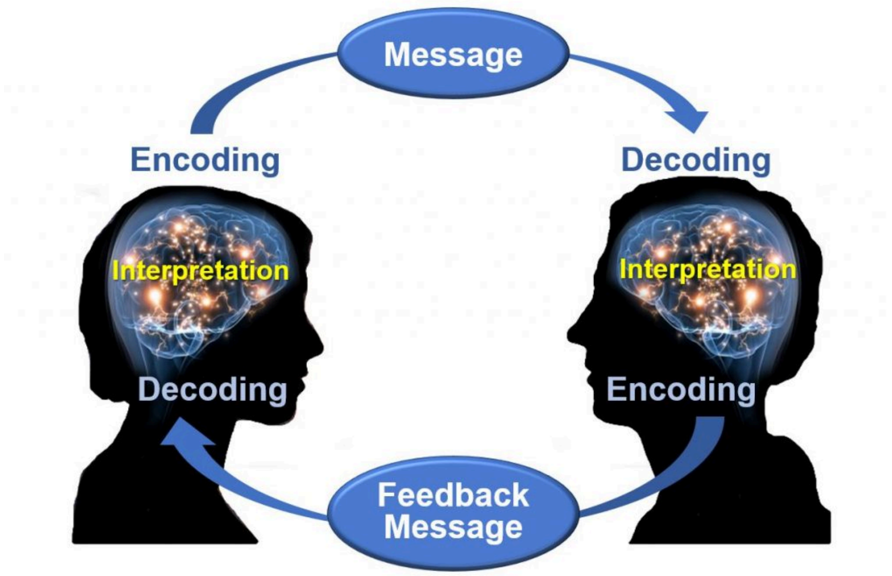

Figure 2.1: The Osgood-Schramm model of communication. Sources: Kisspng, 2018; Web Editor 4, 2017

Step 1: Idea Formation – The communication process begins when the sender has an idea to be communicated. The idea will be influenced by complex factors surrounding the sender. The sender must begin by clarifying the idea and purpose. What exactly does the sender want to achieve? How is the message likely to be perceived? Knowing this information provides a higher chance of successful communication

Step 2: Message Encoding – The idea must be encoded into words, symbols, and gestures that will convey meaning. Because no two people interpret information in the exact same way, the sender must be careful to choose words, symbols and gestures that are commonly understood to reduce the chances of misunderstanding. Therefore, a sender must be aware of the receiver's communication skills, attitudes, skills, experiences, and culture to ensure clear communication.

Step 3: Message Transmission: Choosing the medium to transmit the message is the next step in the communication process. Messages can be transmitted in a verbal, written, or visual manner (see Table 1). For clear communication to occur, the medium and message must match

Table 2.1: Message Transmission Mediums

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

Step 4: Decoding – When the message reaches the receiver, the message must be decoded into its intended meaning. Therefore, the receiver must translate the words, symbols, and gestures as the sender intended. Because no two people interpret information in the exact same way, incorrectly decoding a message can lead to misunderstanding. Successful decoding is more likely when the receiver creates a receptive environment and ignores distractions. Alert receivers strive to understand both verbal and nonverbal cues, avoid prejudging the message, and expect to learn from the communication.

Step 5: Feedback – A vital part of the communication process is feedback. Feedback occurs the sender and receiver check to ensure the message was understood as intended. Feedback is a shared responsibility between the sender and the receiver and can be verbal or non-verbal. For example, the sender can elicit feedback by asking, "Do you have any questions?" The sender can also improve the feedback process by only providing as much information as the receiver can handle. Receivers can encourage clear communication by providing clear, timely, descriptive, and non-judgmental feedback. For example, the receiver can shake his/her head up and down to confirm "yes" I have a question.

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https://pressbooks.nscc.ca/nscccommtrades/?p=30#h5p-2

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 the 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 verb

and the nonverbal channels, it's extremely important that you be in complete control of the communication process in order to present yourself as a detail-oriented *pro*—one that can be trusted to get the job done perfectly.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=30#h5p-3

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.
- The communication process has five steps: idea formation, encoding, channel selection, decoding and feedback.
- Anything that interferes with clear communication is called noise.
- Noise can interfere with each step of the communication process.

Exercises 2.1

1. 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

After studying this unit, you will be able to

- troubleshoot communication errors by breaking down the communication process into its component parts

INTRODUCTION

Now with a basic overview of the communication process, troubleshooting miscommunication barriers becomes a matter of locating wherein the communication process 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 costly business errors. 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 real scenarios. 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 $5 million in a Maine labour dispute (Associated Press, 2017). In both cases, everyone involved would have preferred to continue with business as usual rather. 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.

COMMUNICATION BARRIERS

The communication process may seem simple, but it is not. There are many barriers and distractions that can inhibit clear communication between sender and receiver. How many times have you thought you communicated an idea clearly only to later understand that you were completely misunderstood? Anything that interferes with clear communication is called **Noise.** Clear communication can be improved by learning to recognize the noises, or barriers to clear communication, that disrupts the various steps in the communication process.

Noise in the Communication Process

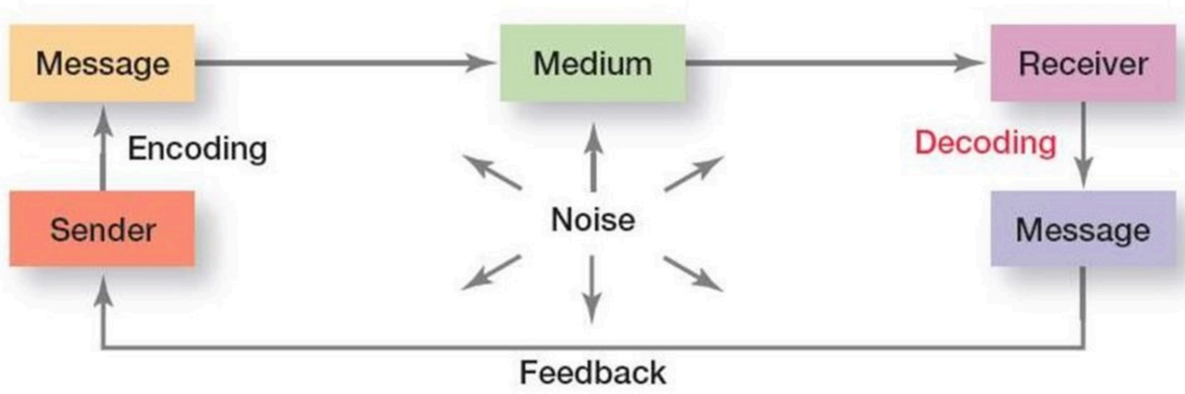

Figure 3.1: Every step in the communication process can be disrupted by Noise. (Source: https://en.ppt-online.org/344580)

Some of the most significant noises are discussed in more detail after this short video presentation of *10 Barriers to Effective Communication*.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=35#h5p-4

SIGNIFICANT COMMUNICATION BARRIERS

Bypassing: Different words have different meanings to different people. Bypassing happens when two people attached different meanings to the same word. For communication to be successful, the sender and receiver must attach the same meaning to the words, gestures, and symbols used to compose a message. Therefore, using concrete words and commonly understood symbols and gestures will decrease the chances of miscommunication.

Frame of Reference: Everyone experiences the world through a unique perspective based on individual experiences, backgrounds, culture, personality and many other factors. Thus, no two people experience the world exactly the same. To ensure communication is clear, the sender must be aware of his/her own frame of reference and the receiver's frame of reference to achieve clear communication. For example, the frame of reference between baby-boomers and millennials is quite different. Therefore, inter-generational communication in the workplace can lead to miscommunication if the sender and receiver do not account for the different frames of reference.

Language Skills: No matter how great the message, it will not be understood or fully appreciated if the appropriate oral and written skills are not used to express the message. Spelling, grammar, sentence structure, and fluency errors all interfere with clear communication. In addition, using jargon, slang, and unfamiliar words will also decrease clear communication.

Distractions: Emotional interference, physical distractions, and digital interruptions will also decrease clear communication. Shaping an objective message is difficult when one is feeling joy, fear, resentment, hostility, sadness, or some other strong emotion. Physical distractions, such as faulty acoustics; **sloppy appearance and careless formatting**; as well as **multi-tasking**, **information overload**, conflicting demands can all interfere with clear communication. Focusing on what is important and shutting out interruptions increase the chances of effective communication.

CATEGORIES OF MISCOMMUNICATION

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 topical questions.
- 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.

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 conversation. 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.

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 11:45 a.m., you just crossed paths with your manager in the hallway, and she's the one who said: "I'm hungry." 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 signaling 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.

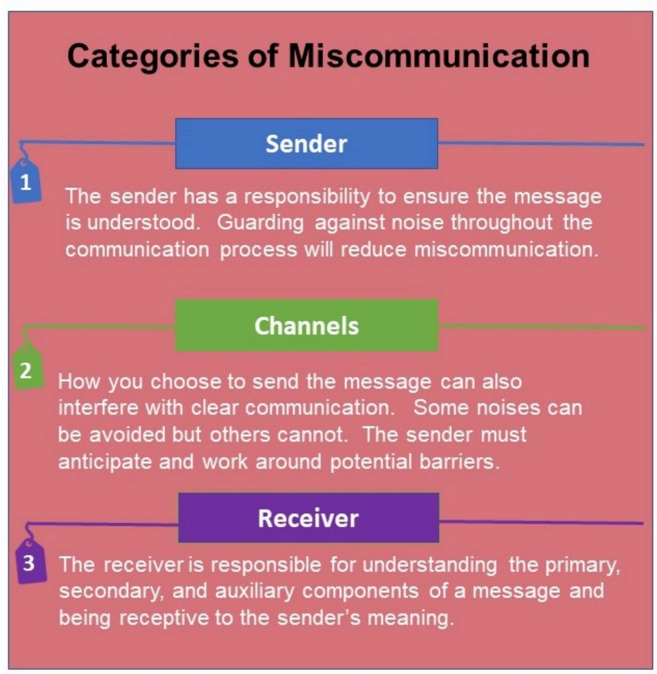

Figure 3.2: The three main categories of miscommunication: sender, channels, and receiver.

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 responsibility 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, 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.

OVERCOMING BARRIERS

Understanding the nature of communication can help you overcome the many barriers that can interfere with clear communication. Recognizing that the communication process is noise-sensitive will help you anticipate the potential noises that can cause miscommunication. Figure 3.2 provides strategies to help you overcome four different categories of noise.

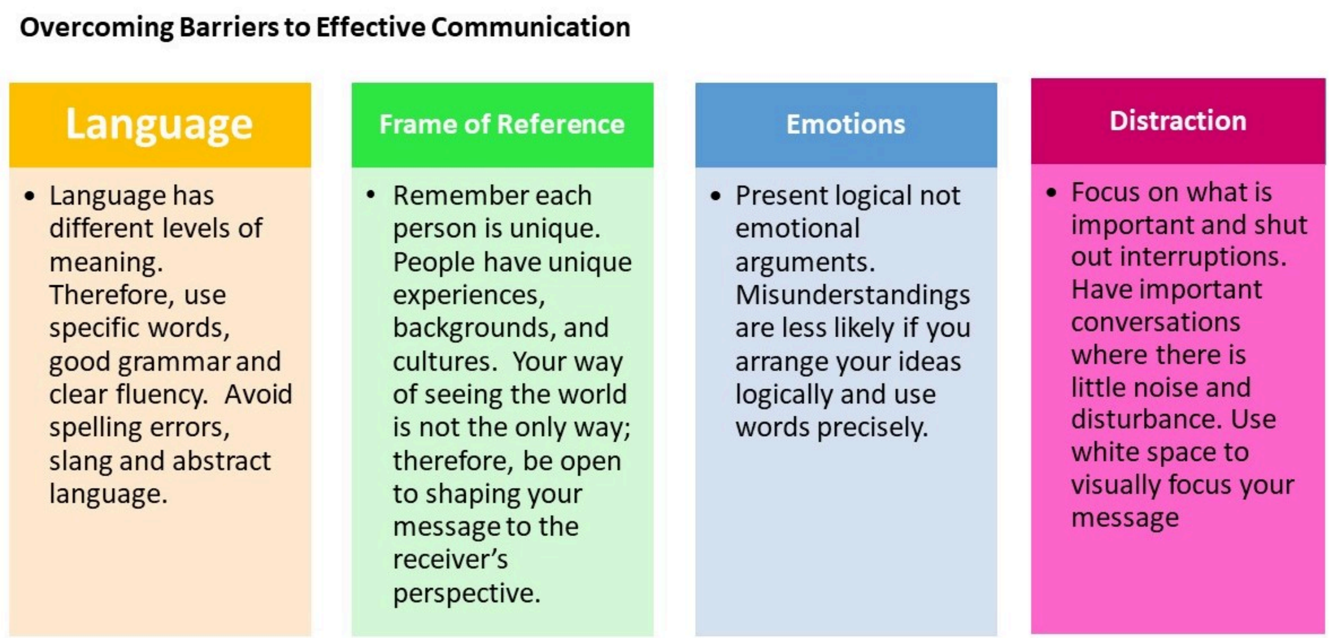

Figure 3.3: Strategies to overcome communication barriers. (Business Communications, 2018)

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.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=35#h5p-5

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

JORDAN SMITH, MELISSA ASHMAN, ECAMPUSONTARIO, BRIAN DUNPHY, AND ANDREW STRACUZZI

Learning Objectives

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 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.

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.

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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CHAPTER 2 COMMUNICATING IN A TECHNICAL ENVIRONMENT

Technical writing gives practical information to a specific audience, which will enable that audience to understand the topic well enough to make a decision or perform a task. This chapter introduces the steps to planning technical documents that meet the needs of the audience and industry standards. There are many types of technical documents that range in the amount of detail provided depending on the audience. Here are some examples

The sentence definition is the most basic form of technical writing. It is used to define a term in its simplest form in one sentence. The art in writing sentence definitions is to define the term so clearly that it can only mean on object or process. Sentence definitions form the backbone of all technical writing. Sentence definitions are used on their own when the audience has minimal or no technical knowledge and they just want to know what the word means.

A description is used to provide the reader with some technical detail about a device or process including what it is, what it looks like and how it works. The art in writing descriptions is knowing just how much technical detail the reader needs to make a decision. Graphics are often used to help the reader visualize the process or device. Descriptions are used when the audience has some technical knowledge and they wants to gain a general understanding of the device or process usually to make a decision.

Instructions are used to provide the reader with enough technical detail use a device or perform a process. The art in writing instructions is being able to break everything down into simple steps without leaving out any detail. Graphics are often used to help the reader visualize the process or device. Instructions are used when the audience has the technical knowledge needed to perform the job

2.1 WHAT IS TECHNICAL COMMUNICATION?

SUZAN LAST

Learning Objectives

This unit will help you:

1. Understand what technical writing is, why its important, and what it looks like
2. Apply a "problem-solving" approach to communications tasks, starting by learning how to fully define the problem before looking for solutions
3. Recognize the main conventions and characteristics of technical writing, and how they differ from other forms, such as academic and journalistic writing
4. Understand the importance of defining the "rhetorical situation" in which you are communicating
5. Apply what you have learned so far by examining "case studies" that demonstrate the costs of poor communication
6. Appreciate the complexity and iterative nature of a writing process in determining what writing process works best for you.

When you hear the term "technical communication," what comes to mind? Perhaps you think of scientific reports, specifications, instructions, software documentation, or technical manuals. And you are correct. However, technical communication is so much more than that. Technical Writing is a genre of non-fiction writing that encompasses not only technical materials such as manuals, instructions, specifications, and software documentation, but it also includes writing produced in day-to-day business operations such as correspondence, proposals, internal communications, media releases, and many kinds of reports. It includes the communication of specialized technical information, whether relating to computers and scientific instruments, or the intricacies of meditation. And because oral and visual presentations are such an important part of professional life, technical communication also encompasses these as well.

WHY ARE TECHNICAL COMMUNICATION SKILLS IMPORTANT?

In a recent presentation on the topic of Co-op Work Term Reports, [1] the Engineering co-op coordinator for the University of Victoria presented the following statistics regarding the importance of communication skills in the professional world of engineering:

> **The Reality: Technical Writing and Communication**
>
> - How graduate engineers spend their time:
>   - 25-50% Problem solving of some kind
>   - 50-75% Communicating (Writing and reading reports, letters, memos, proposals, presentations, discussions w/colleagues, managers, clients)
> - Performance evaluations and job advancement usually depend more on communications skills than on technical skills

He added that engineers who are more advanced in their careers spend only 5-10% of their time engaged in problem solving of some kind and 90-95% of their time engaging in related communications tasks: researching, writing and reading reports, proposals, emails, letters, memos; giving or attending presentations; discussing and meeting with colleagues, team mates, managers, clients, and so forth. In a recent survey of over 1000 professionals from various professions, over 70% of engineers and almost 50% of programmers rated the quality of their writing as either "very important" or "extremely important" to the performance of their jobs.[2] Clearly, as Barry Hyman asserts in *Fundamentals of Engineering Design*, "the stereotype that engineering is for inarticulate nerds is way off base." [3]

Technical communication is "transactional" – it entails a purposeful transaction between sender and receiver that provides specific information for practical and specific purposes (informing, instructing, persuading) and is usually geared towards the needs of a specific audience. Technical communicators produce a wide variety of documents and other products, such as

- Proposals and requests for proposals (RFPs)
- Technical or research reports
- Documentation records and product specifications
- User guides (step-by-step instructions, procedures, manuals)
- Online help, technical support
- Reference information (encylopedia-style information)

1. S. McConkey, "Writing a work term report," *ENGR 120 Plenary Lecture*, University of Victoria, March 3, 2017.
2. J. Swartz, S. Pigg, J. Larsen, J. Helo Gonzalez, R. De Haas, and E. Wagner, "Communication in the workplace: What can NC State students expect?" Professional Writing Program, North Carolina State University, 2018 [Online]. Available: https://docs.google.com/document/d/1pMpVbDRWIN6HssQQQ4MeQ6U-oB-sGUrtRswD7feuRB0/edit
3. B. Hyman, "Ch. 2: Problem formulation," in *Fundamentals of Engineering Design*, Upper Saddle River, NJ: Prentice Hall, 2002, p. 42.

- Consumer literature (information for the public about regulations, safety issues, *etc*.)
- Marketing literature (product specifications, brochures, promotional literature)
- Technical journalism (found in trade magazines, media releases, *etc.*)

Thus, it is a highly "designed" form of communication that requires practitioners to have a heightened awareness of the **conventions** (rules and expectations) and **rhetorical situations** (audience, purpose, context) in which they are communicating.

This textbook aims to provide you with that heightened awareness – that is, to introduce you to the basic conventions of technical communications, and to train you to take a **reader- and audience-centred approach** to communications tasks, to find the tools and methods that will work best to communicate your ideas to your target audience, and to achieve the desired results.

WHAT DOES TECHNICAL WRITING LOOK LIKE?

Technical communications can take many forms, depending on the purpose and intended audience. Consider the following example of technical writing, which is an excerpt adapted from a book called *Scientific Sailboat Racing* by Ted Wells. [4] From the excerpt in the box below, what can you tell about the intended audience?

The most common question asked by skippers wanting to get to the windward mark faster than they have been doing is "**How can I make my boat point higher?"** Getting to the windward mark first depends primarily on the skill and experience of the skipper; however, having a well-rigged boat will make a significant difference. Look for the following, in order of importance:

1. **Sails:** Have good quality sails, and use the appropriate sails for the wind conditions expected. No one can win races with poor sails, so use the best you can afford. Keep in mind that the leeches of all sails flutter a little, the jib will backwind the luff of the main on any full or medium sail, and in very light wind, even a perfectly cut sail will probably develop a wrinkle along the front of the battens. If the sails are obviously no good, replace them.
2. **Mast and Centerboard:** Ensure that the mast is far enough forward and the centerboard is far enough back so that there is little or no weather helm. Make sure the stiffness of the mast suits the sails.
3. **Jib Fairleads**: Ensure jib fairleads are properly located for the type of jib being used and the strength of wind expected.
4. **Cleats:** Have cleats for both jib and mainsheet; place cleats so that crew can easily make small adjustments for varying wind velocities and hang on the to the jib sheet without having it pop out of the cleat.
5. **Traveler**: Have a mainsheet traveler that allows the main to be pulled down without pulling the boom in too far; it should allow the sail to be pulled down tightly enough so that

4. T. Wells, *Scientific Sailboat Racing*, New York: Dodd, Mead, and Co., 1950, pp. 94-96.

the leech does not fall off without pulling the boom in any further than it should be.

6. **Tiller:** Have a flexible tiller extension that allows you to sit well forward, but can be adjusted so that it does not get in the way when coming about.
7. **Boat Weight:** Keep the boat as close to minimum weight as possible. Clearly, a lighter boat is easier to handle, but this is not as critical as other factors. If choosing between a lighter crew member with less skill and experience, and a heavier crew member who has greater skill, the latter is usually preferable.

Once the boat is properly set up, a skilled and experienced skipper can point significantly higher than expected by understanding and using wind deflection from other boats. Immediately to leeward of any boat and extending for a distance of about three mast lengths, there is a wind shadow where the wind velocity is greatly decreased. To leeward of the bow of the boat there is a very small region where the direction of the wind is deflected opposite to the normal deflection and where the velocity is accelerated slightly (see Figure 34). Except in the direct wind shadow, the deflection of the wind is more important than the decrease in wind velocity, as the decrease in velocity is very slight except in the immediate shadow of the sails of the windward boat.

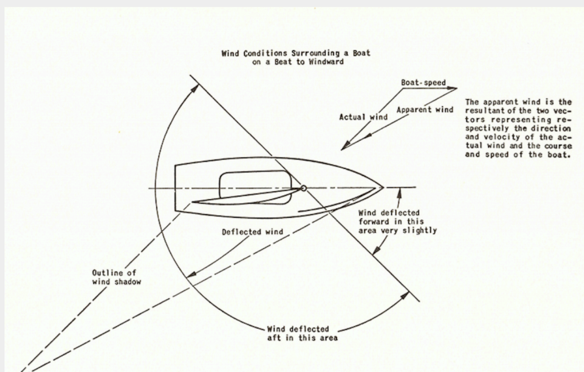
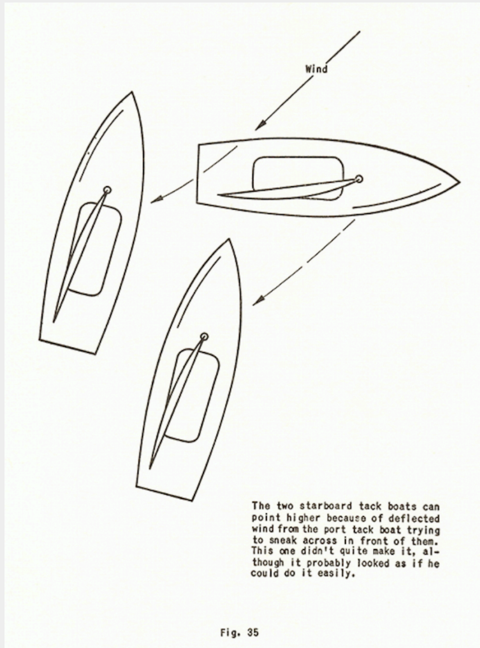


Fig. 34

Because of this wind deflection, a boat on the opposite tack cutting behind another boat will be able to point appreciably higher than it normally would. Many skippers on port tacks who thought they could clear starboard tackers have been fooled by not realizing this fact. The deflection of their wind in trying to cross in front of the starboard tacker will enable the starboard tacker to point higher without luffing than he normally would be able to do, and the port tacker who thought he could squeeze by suddenly finds that he cannot (See Figure 35).



EXERCISE 1.1 Draft some technical writing related to your interests

Reflect on the description and example of technical writing above in relation to your experience as an employee, as a student, or as a practitioner of a hobby. What kinds of documents have you written that could fall under the genre of Technical Writing?

Write a paragraph or two on a topic about which you have specialized knowledge, and can use specialized terminology to explain the idea or instruct the reader. For example, you might write about effective techniques for executing certain skateboard maneuvers or how to execute a yoga position such as a "downward facing dog." Consider your audience when choosing how to write this. Will the audience have to be familiar with the terminology used, as in the above sailing example? See if you can write a paragraph that can "baffle me with your techno-jargon," and then re-write for a general audience, using plain language.

2.2 PROBLEM-SOLVING APPROACH TO COMMUNICATIONS TASKS

SUZAN LAST

Learning Objectives

Describe and use a clearly-articulated design.

In the workplace, many of the communications tasks you perform are designed to solve a problem or improve a situation. Whether you are doing work for a client, for your employer, with your team, or for someone else, you will typically use some sort of design process to tackle and solve the problem. A clearly-articulated design process provides you with a clear, step-by-step plan for finding the best solution for your situation.

Take a moment to search the Internet for the term "design process" and look at "images." You will find many variations. Have a look at several of them and see if you can find a common pattern.

One commonality you will likely find in examining other people's design process diagrams is this: the first step in designing any solution is to clearly **define the problem**. **Figure 1.**[1] shows NASA's basic design process. Think about the kind of communication that each step of this process might entail.

1. "NASA design process." NASA STEM Engagement [Online]. Available: https://www.nasa.gov/audience/foreducators/best/index.html.Used for educational and noncommercial purposes.

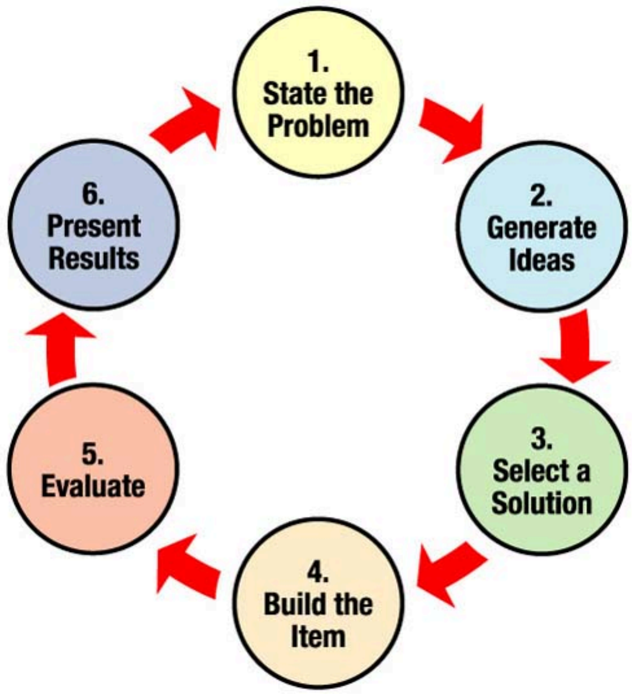


Figure 1. NASA's Design Process Diagram.

You cannot begin to work on solutions until you have a clear definition of the problem and goals you want to achieve. This critical first stage of the design process requires that you effectively communicate with the "client" or whoever has the "problem" that needs solving. Poor communication at this stage can derail a project from the start.

For our purposes, we will use Barry Hyman's Problem Formulation model [2] to clearly define a problem. Hyman's Problem Formulation model consists of 4 elements:

1. **Need Statement:** recognizes and describes the need for a solution or improvement to an "unsatisfactory situation." It answers the questions, "what is wrong with the way things are currently? What is unsatisfactory about it? What negative effects does this situation cause?" You may need to do research and supply data to quantify the negative effects.
2. **Goal Statement:** describes what the improved situation would look like once a solution has been implemented. The goal statement defines the scope of your search for a solution. At this point, do **not** describe your solution, only the goal that *any* proposed solution should achieve. The broader you make your goal, the more numerous and varied your solutions can be; a narrowly focused goal limits the number and variety of possible solutions.
3. **Objectives:** define measurable, specific outcomes that any feasible solution ***should*** optimize (aspects you can use to "grade" the effectiveness of the solution). Objectives provide you with ways to quantifiably measure ***how well*** any solution will solve the problem; ideally, they will allow you to compare multiple solutions and figure out which one is most effective (which one gets the highest score on meeting the objectives?).
4. **Constraints:** define the limits that any feasible solution ***must*** adhere to in order to be

2. B. Hyman, "Ch. 2: Problem formulation," in *Fundamentals of Engineering Design*, Upper Saddle River, NJ: Prentice Hall, 2002, pp. 40-54.

acceptable (pass/fail conditions, range limits, *etc*.). The key word here is ***must*** — constraints are the "go/no go" conditions that determine whether a solution is acceptable or not. These often include budget and time limits, as well as legal, safety and other regulatory requirements.

COMMUNICATION AS SOLUTION

This model can apply to a communications task as well as more physical design tasks. Imagine your communications task as something that will solve a problem or improve a situation. Before you begin drafting this document or presentation, define the problem you want to solve with this document:

- **Understand the Need:** consider what gave rise to the need to communicate. Does someone lack sufficient information to make a decision or take a position on an issue? Did someone request information? Is there some unsatisfactory situation that needs to be remedied by communicating with your audience? What specifically is unsatisfactory about it? Consider your audience. For example
    - *A potential client lacks sufficient information on whether the solution I have proposed to solve the client's problem will be feasible, affordable, and effective.*
    - *My instructor lacks sufficient examples of my written work to assign a grade for how well I met the course learning objectives.*
- **Establish a Goal:** consider your purpose in writing. What do you want your reader to do, think, or know? Do you want your reader to make a decision? Change their opinion or behaviour? Follow a course of action? What is your desired outcome? And what form and style of communication will best lead to that outcome? For example
    - *Provide the client with enough information, in an effective and readable format, to make a decision (ideally, to hire you to build the solution for the problem).*
    - *Provide my instructor with samples of my writing that demonstrate my achievement of the course learning objectives (provide relevant and complete information in a professionally appropriate format, using evidence-based argument; earn an A+ grade on the assignment.*)
- **Define Objectives:** consider the specifics of your message and your audience to determine what criteria you should meet. What form should it take? What content elements will you need to include? What kind of research will be required? What information does your audience want/need? What do they already know?
    - *Review the client's RFP to see what specific objectives it lists and how your proposal will be assessed.*
    - *Review the Assignment Description and Grading Rubric for your assignment to determine specific requirements and learning objectives that your instructor will use to evaluate your work.*
- **Identify Constraints:** what are the pass/fail conditions of this document? Consider your rhetorical situation. What conditions exist that present barriers or challenges to communication? How can you address them? For example,
    - how much time is your audience willing to spend on this? How long can you make your document or presentation? (word length/time limit)

- What format and style do they require? Is there a Style Guide you must follow? A template you can use?
- How much time do you have to create it? Do you have a deadline? (due date)
- Are there requirements for using sources? (academic integrity rules)

Keep in mind that the document you produce is evaluated in terms of how well it responds to the "problem" — that is, how well it meets the overall goal and demonstrates achievement of specific objectives while abiding by constraints.

EXERCISE: Define a problem

Think of a problem or an "unsatisfactory situation" that you have recently experienced. It could be as simple as **it's 8pm, I haven't had dinner yet, and I'm hungry**. Use Hymen's Problem Formulation schema to formally define the problem — without proposing any particular solutions. Your problem definition should ideally allow multiple possible solutions that adhere to the following:

1. Need/Unsatisfactory situation:
2. What is your goal?
3. What are some measurable objectives you want to achieve?
4. What are your constraints?

Download and use the attached **Problem Definition Template (.docx)**

2.3 CONVENTIONS AND CHARACTERISTICS

SUZAN LAST

Learning Objectives

Describe and use a conventions.

Every genre of writing has unique characteristics and rules, called **conventions**, that help readers classify a document as belonging to a particular genre. This also applies to film and music. Think about the last movie you saw. What type of movie was it? What about that movie gave you that impression? Did the characters wear Stetson hats, ride horses, and carry guns? Did they fly in space ships, encounter alien beings, and use futuristic technology? Those elements are typical conventions of Western and Science Fiction genres.

Non-fiction is a category that can be broken into various genres and sub-genres. The main types of non-fction that are relevant to us are journalism (newspaper writing), academic writing (written by scholars and published in peer reviewed academic journals or books), and technical writing. Before we get into the specific conventions that characterize technical writing, take a moment to think back to your academic writing course and list some conventions typical of journalism (popular press) and academic writing in **Table 1.**

TABLE 1 Identify the conventions for journalistic and academic writing

Criteria	Journalistic	Academic
Purpose		
Audience		
Writing Style		
Tone		
Structure		
Format/Formatting		
Other Features		

Like journalism and scholarly writing, technical writing also has distinct features that readers expect to see in documents that fall within this genre. These include (a) use of headings to organize information into coherent sections, (b) use of lists to present information concisely, (c) use of figures and tables to present data and information visually, and (d) use of visual design to enhance readability. These conventions are connected to the **main purposes** of technical writing, which include communicating the following:

- Technical or specialized information in an accessible and usable ways
- Clear instructions on how to do something in a clear manner
- Information that advances the goals of the company or organization.

Technical documentation is intended to communicate information to the people who need it in a way that is clear and easy to read, at the right time to help make decisions and to support productivity. Designing technical communication is like designing any other product for an intended user: the ultimate goal is to make it "user friendly."

Key words here are *accessible, usable, clear, goal-oriented, effective*, and *reader-centred*. The characteristics of technical writing support these goals and concepts.

If we filled in **Table 1** with typical characteristics of technical writing, it might look something like **Table 2**.

TABLE 2. Conventions of Technical Writing

Criteria	Technical Writing
Purpose	To communicate technical and specialized information in a clear, accessible, usable manner to people who need to use it to make decisions, perform processes, or support company goals.
Audience	Varied, but can include fellow employees such as subordinates, colleagues, managers, and executives, as well as clients and other stakeholders, the general public, and even readers within the legal system.
Writing Style	Concise, clear, plain, and direct language; may include specialized terminology; typically uses short sentences and paragraphs; uses active voice; makes purpose immediately clear.
Tone	Business/professional in tone, which falls between formal and informal; may use first person or second person if appropriate; courteous and constructive.
Structure	Highly structured; short paragraphs; clear transitions and structural cues (headings and sub-headings) to move the reader directly and logically through the document.
Format/Formatting	Can be in electronic, visual, or printed formats; may be long (reports) or short (emails, letters, memos); often uses style guides to describe required formatting features; uses headings, lists, figures and tables.
Other Features	Typically objective and neutral; ideas are evidence-based and data-driven; descriptors are precise and quantitative whenever possible.

2.4 UNDERSTANDING THE RHETORICAL SITUATION

SUZAN LAST AND CANDICE NEVEU

Learning Objectives

Describe and use **Task and Audience Analysis** .

It is common knowledge in the workplace that no one really *wants* to read what you write, and even if they want to or have to read it, they will likely not read all of it. So how do you get your reader to understand what you need quickly and efficiently? Start by doing a detailed **Task and Audience Analysis** — make sure you understand the "rhetorical situation." Before you begin drafting a document, determine the needs of your rhetorical situation (See **Figure 1**).

***Figure 1.** The Rhetorical Situation.*

The "rhetorical situation" is a term used to describe the components of any situation in which you may want to communicate, whether in written or oral form. To define a "rhetorical situation," ask yourself this question: "**who is talking to whom about what, how, and why?**" There are five main components:

- Purpose
- Writer
- Audience
- Message
- Context/Culture

PURPOSE refers to *why* you are writing. Determining your purpose requires that you engage in ***Task Analysis*** — that is, determine what you hope to accomplish by writing this document. Ask yourself what you hope the reader(s) will do/think/decide/ or how they will behave as a result of reading the text. There are three general purposes for communication in the workplace: 1) to create a record, 2) to give or request information, and 3) to persuade.

Within those general purposes, you will find a myriad of specific purposes. For example, your purpose may be to propose an innovative solution to a specific problem. In this case, you want the reader to agree to explore the idea further, or approve funding for further research and development, which would fall under the general purpose of writing to persuade.

WRITER refers to you, the writer/creator/designer of the communication. It is important to examine your own motivation for writing and any biases, past experiences, and knowledge you bring to the writing situation. These elements will influence how you craft the message, whether positively or negatively. This examination should also include your role within the organization, as well as your position relative to your target audience.

AUDIENCE refers to your readers/listeners/viewers/users. ***Audience Analysis*** is possibly the most critical part of understanding the rhetorical situation. Consider **Figure 2** below. Is your audience internal (within your company) or external (such as clients, suppliers, customers, other stakeholders)? Are they lateral to you (at the same position or level), upstream from you (management), or downstream from you (employees, subordinates)? Who is the primary audience? Who are the secondary audiences? These questions, and others, help you to create an understanding of your audience that will help you craft a message that is designed to effectively communicate specifically to them.

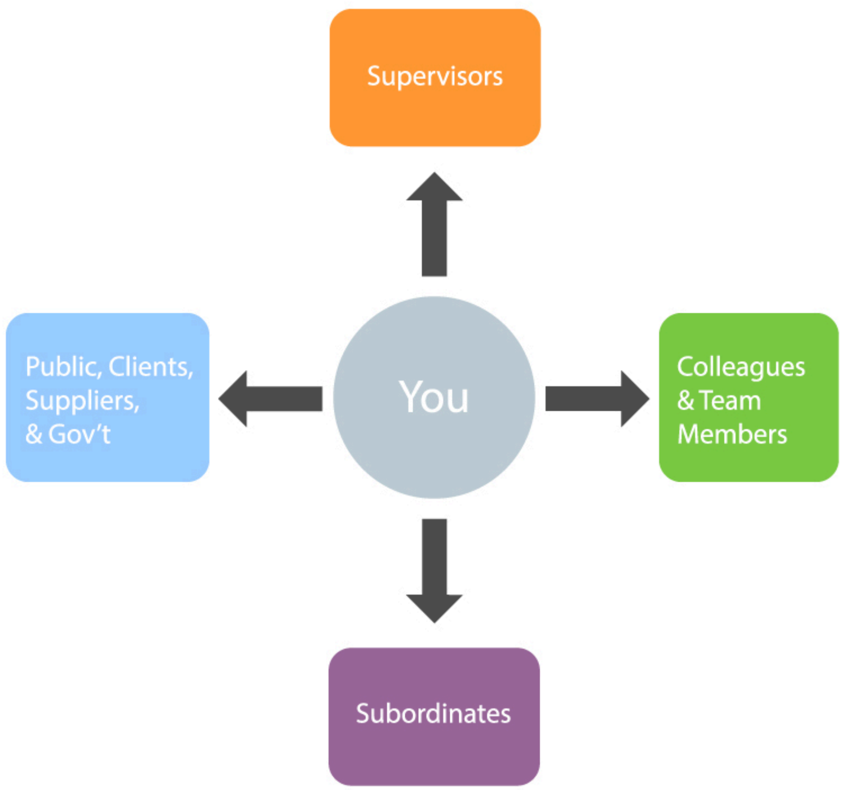


Figure 2 *Understanding your relationship to your audience.*

Keep in mind that your different audiences will also have a specific purpose in reading your document. Consider what their various purposes might be, and how you can best help them achieve their purpose. What do they already know? What do they need to know? Considering what they are expected to do with the information you provide will help you craft your message effectively. Consider also that technical writing often has a long "life-span" – a document you write today could be filed away and reviewed months or even years down the road. Consider the needs of that audience as well.

Audience	Purpose for Reading
Executives	Make decisions
Supervising Experts/Managers	Advise decision makers; direct subordinates
Technical Experts/Co-workers	Implement decisions; advise
Lay People/Public/Clients	Become informed; choose options; make decisions

Some companies develop audience profiles to help guide their communications. This is a good exercise whenever you have something to communicate, especially if the information is complex. Here are some questions to consider as part of the audience profile:

Developing an Audience Profile

- Who are your primary readers? (specific names and titles, or general roles)
- Are they above you in the organizational hierarchy? Lateral, subordinate? Outside of your organization?
- Who else might read this document? (secondary readers)
- Do you know what their attitude towards the topic is?
- How might cultural differences affect their expectations and interpretations?
- How much technical background do the readers have?
- How much do they already know about the topic?
- What situation gave rise to this document?

MESSAGE refers to the information you want to communicate. This is the content of your document. It should be aligned to your purpose and targeted to your audience. While it is important to carefully choose what content your audience needs, it is equally critical to cut out content that your audience does not need or want. "Time is money" may be a tired old cliché, but it is important to avoid wasting your audience's time with information that is unnecessary or irrelevant to them. Your message should be professional, and expressed in an appropriate **tone** for the audience, purpose, and context.

CONTEXT refers to the situation that creates the need for the writing. In other words, what has happened or needs to happen that creates the need for communication? The context is influenced by timing, location, current events, and culture, which can be organizational or social. Ignoring the context for your communication could result in awkward situations, or possibly offensive ones. It will almost certainly impact your ability to clearly convey your message to your audience.

Consider the subtle (and not so subtle) similarities and differences in the rhetorical situation when you offer feedback on Course Experience Surveys vs when you evaluate an instructor on Ratemyprofessor.com.

EXERCISE: Identify the differences in the rhetorical situations

	Course Evaluation Survey	Ratemyprofessor.com
Purpose		
Audience		
Writer		
Message		
Context		

EXERCISE: Task and audience analysis

Download Task and Audience Analysis Exercises (.docx)

The table below contains a collection of details about a research project you have just completed on rising sea levels. Imagine that you're writing documents for each of the 5 following audiences:

1. **Your supervisor/boss**
2. **Scientists**
3. **The general public**
4. **Politician**
5. **High school students**

What information about rising sea levels might each audience be interested in? As you go down the list, write in the blank spaces in front of each detail the letter that corresponds to the audiences that you think would find this detail most relevant.

Consider what kind of document might contain that information for that audience.

Interested Audience	Categories of Information on Sea Level Rise
	The dollar damage caused by sea level increases each year.
	A literature review of previous research on rising sea levels.
	Descriptions of calibration procedures for your instruments.
	Some basic physics of how tides and currents work.
	How much your project costs.
	A log of all your measurements during the whole project.
	A list of people who worked on the project.
	Specifications of a new instrument to measure water conditions.
	A new result showing a connection between sea level and coastal developments.
	Procedures you used to avoid statistical biases in your data.
	Your plans for further measurements.
	Your recommendations for future research.

2.5 CASE STUDY: THE COST OF POOR COMMUNICATION

SUZAN LAST

Learning Objectives

INSERT HERE.

No one knows exactly how much poor communication costs business, industry and government each year, but estimates suggest billions. In fact, a recent estimate claims that the cost in the U.S. alone are close to $4 billion annually![1] Poorly-worded or inefficient emails, careless reading or listening to instructions, documents that go unread due to poor design, hastily presenting inaccurate information, sloppy proofreading — all of these examples result in inevitable costs. The problem is that these costs aren't usually included on the corporate balance sheet at the end of each year, so often the problem remains unsolved.

You may have seen the Project Management Tree Cartoon before (**Figure 1.4.1**); it has been used and adapted widely to illustrate the perils of poor communication during a project.

1. J. Bernoff, "Bad writing costs business billions," *Daily Beast*, Oct. 16, 2016 [Online]. Available: https://www.thedailybeast.com/bad-writing-costs-businesses-billions?ref=scroll

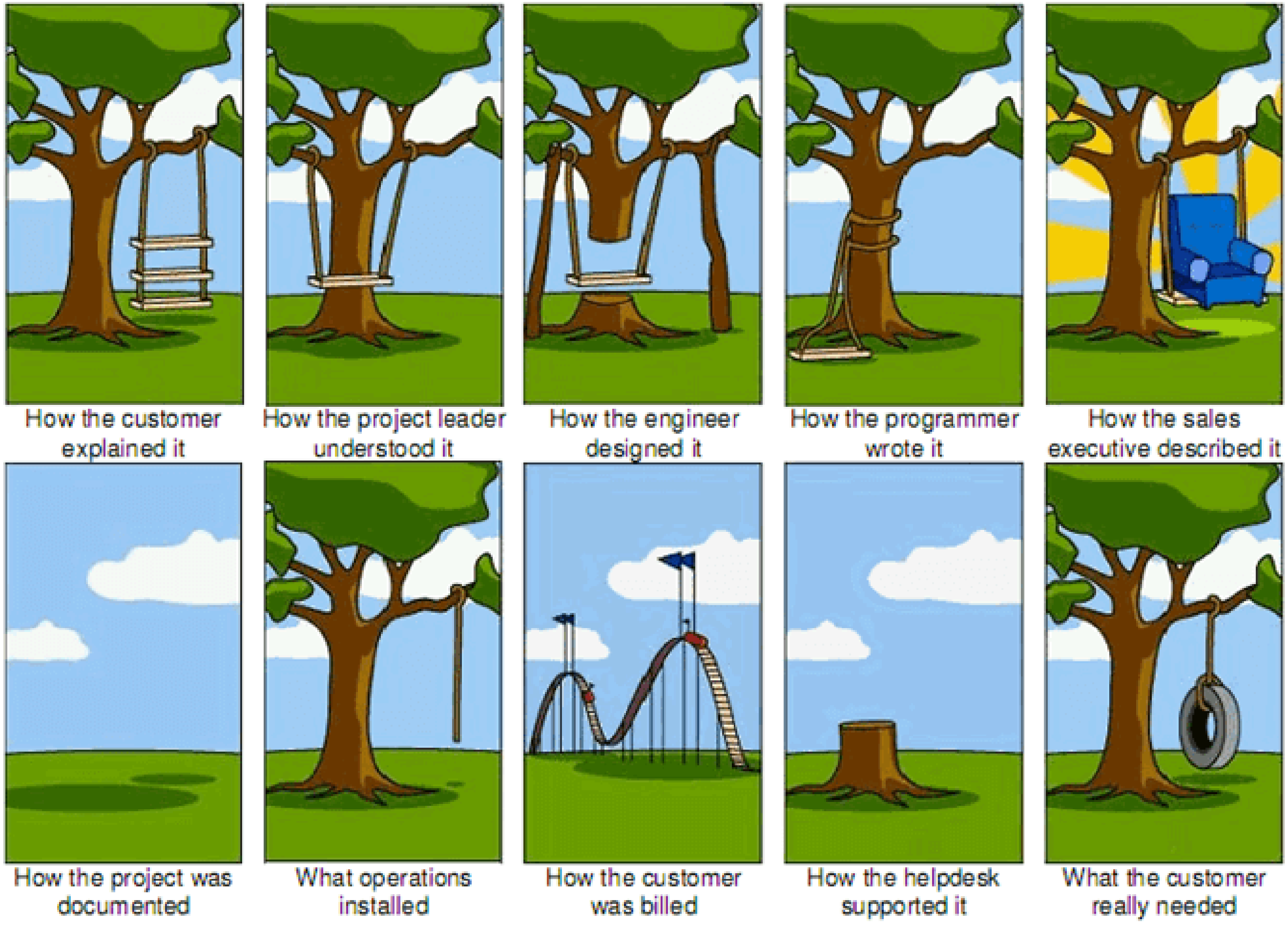


Figure 1 *Project Management Tree Swing Cartoon.* [2]

The waste caused by imprecisely worded regulations or instructions, confusing emails, long-winded memos, ambiguously written contracts, and other examples of poor communication is not as easily identified as the losses caused by a bridge collapse or a flood. But the losses are just as real—in reduced productivity, inefficiency, and lost business. In more personal terms, the losses are measured in wasted time, work, money, and ultimately, professional recognition. In extreme cases, losses can be measured in property damage, injuries, and even deaths.

The following "case studies" show how poor communications can have real world costs and consequences. For example, consider the "Comma Quirk" in the Rogers Contract that cost $2 million.[3] A small error in spelling a company name cost £8.8 million.[4] Examine Tufte's discussion (.pdf) of the failed PowerPoint presentation that attempted to prevent the Columbia Space Shuttle disaster.[5] The failure of project managers and engineers to communicate effectively resulted in the

2. J. Ward, "The project management tree swing cartoon, past and present," TamingData, July 8, 2019 [Online] Available: https://www.tamingdata.com/2010/07/08/the-project-management-tree-swing-cartoon-past-and-present/. CC-BY-ND 4.0.

3. G. Robertson, "Comma quirk irks Rogers," *Globe and Mail*, Aug. 6, 2006 [Online]. Available: https://www.theglobeandmail.com/report-on-business/comma-quirk-irks-rogers/article1101686/

4. "The £8.8m typo: How one mistake killed a family business," (28 Jan. 2015). *The Guardian* [online]. Available: https://www.theguardian.com/law/shortcuts/2015/jan/28/typo-how-one-mistake-killed-a-family-business-taylor-and-sons

5. E. Tufte, *The Cognitive Style of PowerPoint*, 2001 [Online]. Available: https://www.inf.ed.ac.uk/teaching/courses/pi/2016_2017/phil/tufte-powerpoint.pdf

deadly Hyatt Regency walkway collapse.[6] The case studies below offer a few more examples that might be less extreme, but much more common.

In small groups, examine each "case" and determine the following:

1. Define the **rhetorical situation**: Who is communicating to whom about what, how, and why? What was the goal of the communication in each case?
2. Identify the **communication error** (poor task or audience analysis? Use of inappropriate language or style? Poor organization or formatting of information? Other?)
3. Explain what **costs/losses** were incurred by this problem.
4. Identify **possible solution**s or strategies that would have prevented the problem, and what benefits would be derived from implementing solutions or preventing the problem.

Present your findings in a brief, informal presentation to the class.

Exercises adapted from T.M Georges' *Analytical Writing for Science and Technology.*[7]

CASE 1: The promising chemist who buried his results

Bruce, a research chemist for a major petro-chemical company, wrote a dense report about some new compounds he had synthesized in the laboratory from oil-refining by-products. The bulk of the report consisted of tables listing their chemical and physical properties, diagrams of their molecular structure, chemical formulas and computer printouts of toxicity tests. Buried at the end of the report was a casual speculation that one of the compounds might be a particularly effective insecticide.

Seven years later, the same oil company launched a major research program to find more effective but environmentally safe insecticides. After six months of research, someone uncovered Bruce's report and his toxicity tests. A few hours of further testing confirmed that one of Bruce's compounds was the safe, economical insecticide they had been looking for.

Bruce had since left the company, because he felt that the importance of his research was not being appreciated.

CASE 2: The unaccepted current regulator proposal

The Acme Electric Company worked day and night to develop a new current regulator designed to cut the electric power consumption in aluminum plants by 35%. They knew that, although the competition was fierce, their regulator could be produced more cheaply, was more reliable, and worked more efficiently than the competitors' products.

The owner, eager to capture the market, personally but somewhat hastily put together a 120-page proposal

6. C. McFadden, "Understanding the tragic Hyatt Regency walkway collapse," *Interesting Engineering*, July 4, 2017 [Online]: https://interestingengineering.com/understanding-hyatt-regency-walkway-collapse
7. T.M. Goerges (1996), *Analytical Writing for Science and Technology [Online],* Available: https://www.scribd.com/document/96822930/Analytical-Writing

to the three major aluminum manufacturers, recommending that their regulators be installed at all company plants.

She devoted the first 87 pages of the proposal to the mathematical theory and engineering design behind his new regulator, and the next 32 to descriptions of the new assembly line she planned to set up to produce regulators quickly. Buried in an appendix were the test results that compared her regulator's performance with present models, and a poorly drawn graph showed how much the dollar savings would be.

Acme Electric didn't get the contracts, despite having the best product. Six months later, the company filed for bankruptcy.

CASE 3: The instruction manual the scared customers away

As one of the first to enter the field of office automation, Sagatec Software, Inc. had built a reputation for designing high-quality and user-friendly database and accounting programs for business and industry. When they decided to enter the word-processing market, their engineers designed an effective, versatile, and powerful program that Sagatec felt sure would outperform any competitor.

To be sure that their new word-processing program was accurately documented, Sagatec asked the senior program designer to supervise writing the instruction manual. The result was a thorough, accurate and precise description of every detail of the program's operation.

When Sagatec began marketing its new word processor, cries for help flooded in from office workers who were so confused by the massive manual that they couldn't even find out how to get started. Then several business journals reviewed the program and judged it "too complicated" and "difficult to learn." After an impressive start, sales of the new word processing program plummeted.

Sagatec eventually put out a new, clearly written training guide that led new users step by step through introductory exercises and told them how to find commands quickly. But the rewrite cost Sagatec $350,000, a year's lead in the market, and its reputation for producing easy-to-use business software.

CASE 4: One garbled memo – 26 baffled phone calls

Joanne supervised 36 professionals in 6 city libraries. To cut the costs of unnecessary overtime, she issued this one-sentence memo to her staff:

> When workloads increase to a level requiring hours in excess of an employee's regular duty assignment, and when such work is estimated to require a full shift of eight (8) hours or more on two (2) or more consecutive days, even though unscheduled days intervene, an employee's tour of duty shall be altered so as to include the hours when such work must be done, unless an adverse impact would result from such employee's absence from his previously scheduled assignment.

After the 36 copies were sent out, Joanne's office received 26 phone calls asking what the memo meant. What the 10 people who didn't call about the memo thought is uncertain. It took a week to clarify the new policy.

CASE 5: Big science — Little rhetoric

The following excerpt is from Carl Sagan's book, *The Demon-Haunted World: Science as a Candle in the Dark,*[8] itself both a plea for and an excellent example of clear scientific communication:

> The Superconducting Supercollider (SSC) would have been the preeminent instrument on the planet for probing the fine structure of matter and the nature of the early Universe. Its price tag was $10 to $15 billion. It was cancelled by Congress in 1993 after about $2 billion had been spent — a worst of both worlds outcome. But *this* debate was not, I think, mainly about declining interest in the support of science. Few in Congress understood what modern high-energy accelerators are for. They are not for weapons. They have no practical applications. They are for something that is, worrisomely from the point of view of many, called "the theory of everything." Explanations that involve entities called quarks, charm, flavor, color, etc., sound as if physicists are being cute. The whole thing has an aura, in the view of at least some Congresspeople I've talked to, of "nerds gone wild" — which I suppose is an uncharitable way of describing curiosity-based science. No one asked to pay for this had the foggiest idea of what a Higgs boson is. I've read some of the material intended to justify the SSC. At the very end, some of it wasn't too bad, but there was nothing that really addressed what the project was about on a level accessible to bright but skeptical non-physicists. If physicists are asking for 10 or 15 billion dollars to build a machine that has no practical value, at the very least they should make an extremely serious effort, with dazzling graphics, metaphors, and capable use of the English language, to justify their proposal. More than financial mismanagement, budgetary constraints, and political incompetence, I think this is the key to the failure of the SSC.

CASE 6: The co-op student who mixed up genres

Chris was simultaneously enrolled in a university writing course and working as a co-op student at the Widget Manufacturing plant. As part of his co-op work experience, Chris shadowed his supervisor/mentor on a safety inspection of the plant, and was asked to write up the results of the inspection in a **compliance memo**. In the same week, Chris's writing instructor assigned the class to write a narrative essay based on some personal experience. Chris, trying to be efficient, thought that the plant visit experience could provide the basis for his essay assignment as well.

He wrote the essay first, because he was used to writing essays and was pretty good at it. He had never even seen a compliance memo, much less written one, so was not as confident about that task. He began the essay like this:

> On June 1, 2018, I conducted a safety audit of the Widget Manufacturing plant in New City. The purpose of the audit was to ensure that all processes and activities in the plant adhere to safety and handling rules and policies outlined in the Workplace Safety Handbook and relevant government regulations. I was escorted on a 3-hour tour of the facility by…

Chris finished the essay and submitted it to his writing instructor. He then revised the essay slightly, keeping

8. C. Sagan, *The Demon-Haunted World: Science as a Candle in the Dark,* New York, NY: Random House, 1995.

the introduction the same, and submitted it to his co-op supervisor. He “aced” the essay, getting an A grade, but his supervisor told him that the report was unacceptable and would have to be rewritten – especially the beginning, which should have clearly indicated whether or not the plant was in compliance with safety regulations. Chris was aghast! He had never heard of putting the “conclusion” at the **beginning**. He missed the company softball game that Saturday so he could rewrite the report to the satisfaction of his supervisor.

CHAPTER 3 WRITING PROCESS: PLANNING

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 — (1) planning, (2) research or information gathering, (3) drafting and (4) editing) — 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 three 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.

3.1 KNOWING YOUR PURPOSE FOR WRITING

Learning Objectives

After studying this unit, you will be able to

- distinguish between general and specific purposes for writing
- understand the Writing Process

INTRODUCTION

Rarely does anyone write for professional reasons just for fun. There must always be a good reason for writing an email, filling out a work order, or composing a large market research report. Knowing your reason for writing is essential to staying on track in the writing process. Business communications has three main reasons: to **inform**, to **persuade**, and to **communicate goodwill**.

Whatever the purpose of your document, business writing is not intuitive. Thus, the next four chapters will present a systematic plan for preparing business messages in the digital age: pre-writing, drafting, and revising, called the **3-x-3 Writing Process**. The process starts with knowing the purpose of the message, which will guide you towards writing an effective message in a document appropriate for the audience and occasion.

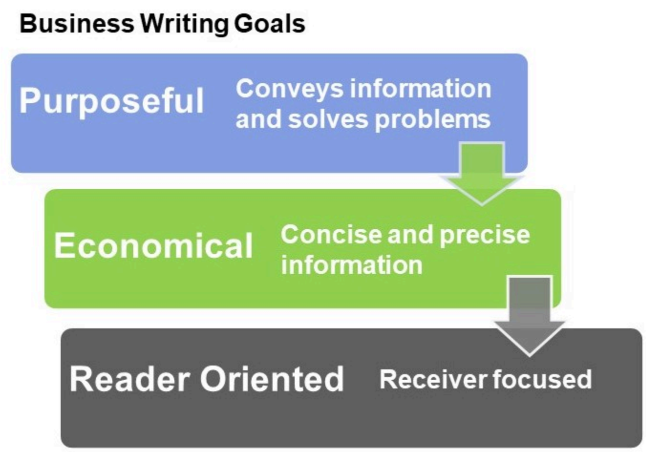


Figure 4.1: An explanation of each goal in the business writing process ([Communicating for Results](), 2017)

THE WRITING PROCESS

Overview

The writing process follows a three-phase process: pre-writing, drafting and revising (see Figure 4.1). The time you will spend in each phase will depend on the complexity of the problem, the purpose and the audience. Business writing differs from other forms of writing. Instead of long paragraphs that fully develop arguments, business writing is focused, clear and concise. In the workplace, writing should be purposeful, economical, and reader-oriented. Writing this way is a skill that takes time and practice to develop. Carefully working through the Writing Process is the key to perfecting this skill.

Pre-writing: Phase I of the writing process involves analyzing the audience. Messages must provide receivers with the information they need or want to be informed or persuaded. Anticipating audience reaction is also part of this phase: will the audience have a positive, negative, or neutral response to the message. A writer must understand these factors and adapt the message to communicate clearly with the intended audience.

Drafting: Phase II of the writing process involves, researching, organizing, and then drafting the message. What information is most important to the receiver is at the heart of each part of this phase. This phase in the writing process is critical to preparing a final document that meets audience needs.

Revising: Phase III involves editing, proofreading and evaluating the message to ensure the message accomplishes the goal of communication.

Figure 4.2: The steps in the Writing Process (Business Communications, 2019).

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https://pressbooks.nscc.ca/nscccommtrades/?p=42#h5p-6

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Key Takeaways

- Business communication has three purposes: to inform, to persuade, and to promote goodwill. Knowing the purpose for writing at the outset helps keep you on track with topic selection.
- The three phases of the Writing Process: pre-writing, drafting, and revising, is a systematic way to make the writing process quicker and easier.

Exercises 4.1

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 own 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).

REFERENCE

Bovee, C.L., Thill, J. V., & Scribner J. A. (2016) Business communication essentials (4th ed.). Don Mills, ON: Pearson Canada Inc.

Guffey, M., Loewry, D., & Griffin, E. (2019). *Business communication: Process and product* (6th ed.). Toronto, ON: Nelson Education. Retrieved from http://www.cengage.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9780176531393&template=NELSON

3.2 ANALYZING YOUR AUDIENCE

Learning Objectives

After studying this unit, you will be able to

- analyze primary and secondary audiences using common profiling techniques
- adjust writing style according to audience size, position relative to you, knowledge of your topic, and demographic

INTRODUCTION

The first commandment in any business is to "Know thy audience." Any act of communication success depends entirely on how well the sender tailors the message to meet the needs and expectations of the audience. A writer should always adjust the message, content and style to what is known or can guess about the audience. A writer should communicate to a customer differently than to a co-worker, and different again when communicating to a manager or to the CEO. In each case, the content, tone, word choices (diction), grammar, and overall style (formal or informal) will change according to the audience.

Understanding how to compose the most appropriate message for an audience takes skill and consideration. However, audience profile allows for effective business messages that achieve their communication goals. When profiling an audience, ask the following questions:

- How big is the main audience? Is it one or two people, a small group, or the general public?
- Who is the **primary** or **secondary** audience?
- What is the professional or personal **relationship** to the organization?
- How much do they already **know** about the topic or message?
- What is the audience **demographic**—i.e., their age, gender, cultural background, educational level, and beliefs?

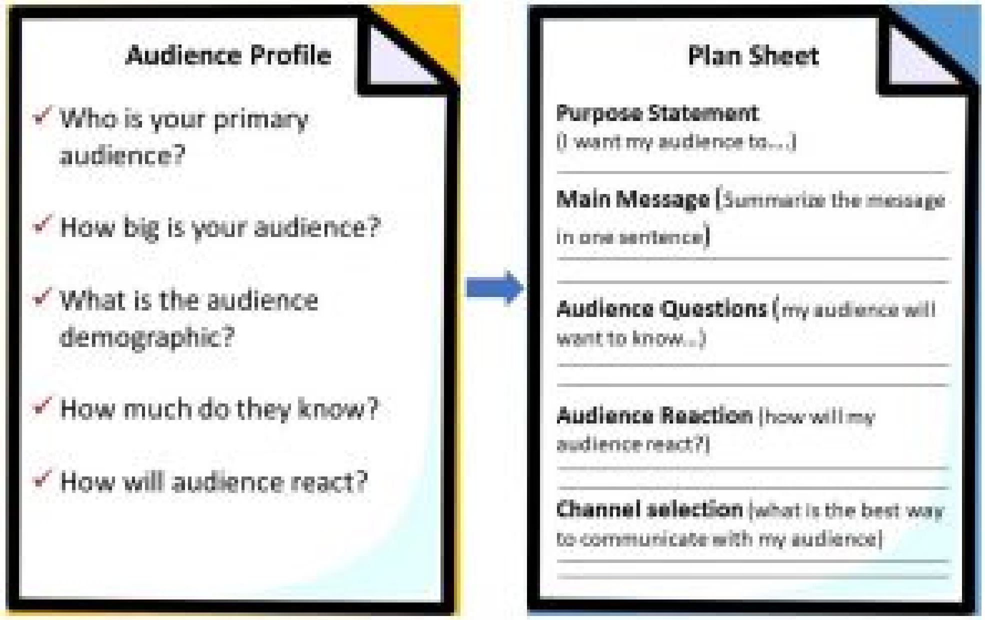

Figure 5.1: How to use an audience profile to write a business message (Business Communication Essentials, 2016).

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

PROFILING THE AUDIENCE

Writing for Audiences of Various Sizes

Writing to one person, a group of people, or the general public requires a different writing style. 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. However, when writing for a larger group, a more general and accessible language is required. When writing for the consumer public, in a blog on a company website, 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 maybe the second or third language. Indeed, the Government of Canada has published a handy guide for how to write accessibly in plain language.

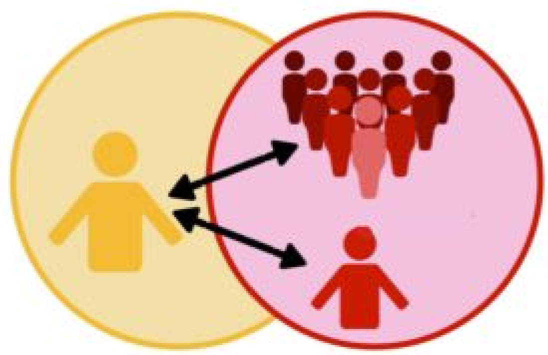

Figure 5.2: A writer may communicate to one person or a group of people (BCcampus, n.d.)

Writing Skill 5.1 – Using Simple and Familiar Language: To effectively communicate with your audience, use plain language and familiar words. By using everyday familiar words, the audience will understand the message easily and quickly. Use jargon only when the audience will understand these specialized terms. When, complex words and difficult concepts must be included, illustrate them with examples and provide a glossary when it is necessary to use several such words/concepts. Use concrete rather than abstract words and give explicit information (*e.g., "car crash" rather than* *"unfortunate accident"*). Finally, choose one term to describe something important and stick to it; using various terms to describe the same thing can confuse the reader

Unfamiliar	Familiar
commensurate	equal
interrogate	question
materialize	appear
obfuscate	confuse
remuneration	pay, salary
terminate	end

Figure 5.3: List of familiar vs unfamiliar. Business writers are encouraged to use accessible language in business documents. (Business Communications, 2019)

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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.).

Writing Skill 5.2 – Bias Language: When writing to large audiences, language must be unbiased in terms of gender, ethnicity, age, ability, or orientation. Communicators want to be inclusive to members of all groups. When communicating to or about a large group of people, using singular pronouns like *he*, *his*, or *she* and *her* would exclude half of the audience. Thus, using gender-neutral plural pronouns such as *they*, *their*, and *them* is preferable. In addition, 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.

[table id=1 /]

Writing Skill 5.3 – English idioms: 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.

Test your knowledge of English idioms by playing the matching game below.

https://quizlet.com/504439289/match/embed?i=scld6&x=1jj1

Primary and Secondary Audiences

Your **primary** audience is the person or group the message is created for; the intended receiver of the message. The primary audience is the decision-maker who will act or not act as a result of the message. Anyone else who may read or listen to the message in the **secondary** audience. The secondary audience falls into two categories. First, those who will influence the primary audience to make a decision; second, those who will be affected by the decision of the primary audience. Consider the situation below to determine the primary and secondary audiences.

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Always consider secondary audiences for any message. Writers have little-to-no control over who sees a message. An email can be forwarded, and text or voicemail messages can be shown or played. Before sending that email or text, or leaving that voicemail in professional situations, always consider how it would be received by both the primary and secondary audiences.

Audience and 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 on the perceived importance of the person you are communicating with.

Employers and clients can be judgmental. An employee's writing represents the company to clients and other stakeholders (Wiens, 2012). Formality in writing requires correct grammar and punctuation, whereas more casual writing takes liberties such as using sentence fragments and contractions. The degree of formality in language will depend on your internal and external audiences. Business communications have three levels of formality depending on who will receive the message: **informal, semi-formal, and formal.** Whatever the level of formality, always remember language must befit the context of the workplace.

Informal Language: The lowest level of formality occurs inside a company when communicating across (between co-workers) or downward (to rank-and-file employees). Here, informal communication can be used in memos, emails, and text messages. When we put pen to paper, informal communication means, use of first-person pronouns, contractions, active language, and conversational language is accepted.

Semi-Formal Language: The next level of formality is used when communicating externally or when communicating internally upwards (to a manager and other executives). Letters, proposals and reports are some documents that required semi-formal language. Semi-formal language involves reducing the use of first-person pronouns, contractions, and conversational language.

Formal Language: The highest level of formality is used when communicating to national or international audiences. A high level of formality means eliminating first-person pronouns, contractions, and idioms. Formal language also involves using third-person pronouns and more passive than active writing. Finally, using words that when defined in a dictionary or translated through an app conveys the same meaning as the communique.

Language Formality Summary

	Informal	Semi-formal	Formal
Audience	Internal • Peers • Rank-and-file employees	Internal • Managers and other executives External • Local	External • National and international audiences
Document Types*	• Emails • Memos • Text messages	• Letters • Proposals • Reports	• Reports • Proposal • Blogs • Websites
Language	• 1st person pronouns • Contractions • Conversational language • Active writing	• Reduce 1st person pronouns • Eliminate contractions • Active and passive writing as necessary	• Use 3rd person pronouns • Use passive writing • Use standard English
*List of document types is not exhaustive.			

Figure 5.4: A summary of the characteristics of each level of formality in business communications. (Communicating for Results, 2017; Business Communications, 2019)

Formality in writing also involves carefully selecting words. Word choice is called "diction". The words used when writing a co-worker should be different from the words used when writing your manager or a customer. Table 5.2 provides word choices that reflect informal, semi-formal and formal language. Understanding the audience will ensure your choice of words is always right for the situation.

Table 5.2 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 / green light	permit	authorize
loaded / well-heeled	wealthy/rich	affluent / monied
deal with	handle	manage
pronto / a.s.a.p.	now	immediately
muddy	confuse	obfuscate

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Audience Knowledge

Understanding how much information the audience knows is important so that the correct amount of information is provided: not too much and not too little. A safe assumption about a professional audience is that they are busy and do not have time to read unnecessary information. Too much information wastes the reader's time, insults their knowledge, and wastes the writer's time. On the other end of that spectrum, writing too little assumes the audience knows more than they do. A lack of necessary information in a message can lead to errors due to confusion, a waste of time as readers request clarification or misunderstanding based on lack of information. Remember, the goal of communication is for the receiver to understand information as intended by the sender. Understanding how much information the receiver requires will help achieve this goal.

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 used among colleagues with the same discipline and specific education. Jargon saves time by making elaborate descriptions unnecessary and is useful among people who speak the same language.

Audience Demographic

The previous subsection explained the necessity of gauging your audience's level of knowledge in a given subject area, and that extends to their more general level of education as well as other demographic factors such as age, gender, religion, income, location, and so on. Demographic information is quantifiable, countable and measurable.

Depending on your profession, you may have to deal with people of all ages and levels of education from elementary school children to the elderly. Understanding the audience's demographic data provides insight and allows a message to be adapted to meet the wants and needs of a specific audience.

Try not to stereotype or make assumptions based on demographic information. People are complicated. Thus, being respectful towards an audience is key to effective communication.

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Writing Skill 5.4 – Highlighting Reader Benefits: Whenever you need to convince an audience to use a service, buy a product, or follow a policy, it's effective to first explain what benefits the audience will receive from the action. Performing audience analysis can help define reader benefits for informative and persuasive messages by uncovering factors that will motivate readers to do or not to do an action. Writing reader-oriented messages means that you write from the perspective of the reader and consider how the reader will decode the message? Keep **WIIFM** in mind when writing messages. Messages that do not answer the WIIFM question are often ineffective in communicating a message. Figure 5.5 provides examples of sender focus and reader focus sentences. In your opinion, which type of sentence is more effective at motivating a reader to complete an action?

Sender Focused	Reader Oriented
Our warranty becomes effective only when we receive an owner's registration.	Your warranty begins when you return your registration.
I need your account number before I can do anything about the problem.	Please provide your account number to solve the problem.

Figure 5.5: Messages that spotlight receiver benefits by using the "you" view (Business Communication, 2019).

Writing Skill 5.5 – "You" View: The "you" view writing technique is used to convert messages from the sender's perspective to the receiver's perspective. Writing in the "you" view literally means using the pronouns 'you' and 'your' to address the reader. These pronouns have a much greater impact when the message is positive or even neutral. Writing this way is counter-intuitive. It is more natural to write from our perspective and to use first-person pronouns to encode messages. However, sender-oriented messages that use first-person personal and possessive pronouns (I, me, my, we, us, and our) don't register as well with readers because that tends to come off as being self-involved. Watch the video, [You Attitude in Business Writing](), for a further explanation of the importance of writing using the "you" view.

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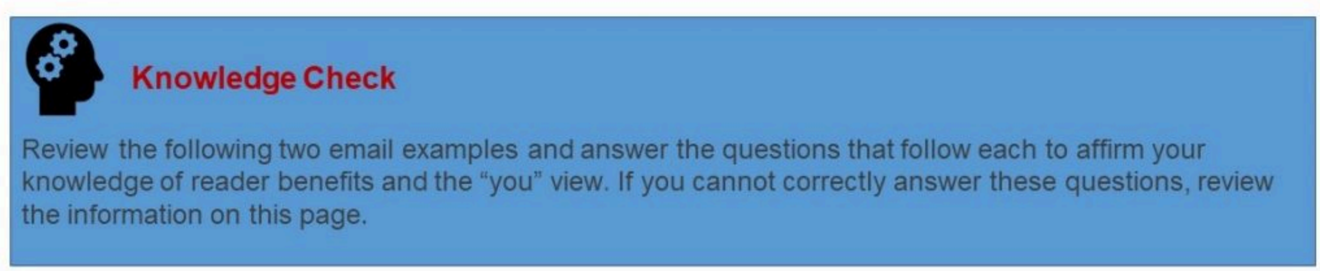
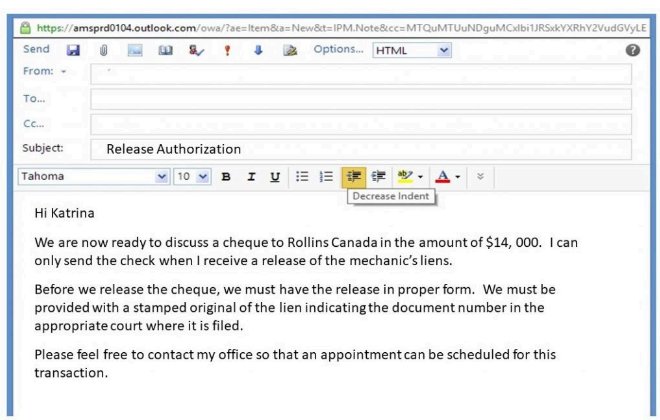
The trick to achieving an audience-oriented message is to catch yourself whenever you begin using first-person pronouns like "I" and "my", and immediately flip the sentence around to say "you" and "your" instead (see figure 5.5). Messages more considerate, sympathetic, and even empathetic when your write from the reader's perspective. In short, the "you" view helps to communicate goodwill.





Hi Katrina

We are now ready to discuss a cheque to Rollins Canada in the amount of $14, 000. I can only send the check when I receive a release of the mechanic's liens.

Before we release the cheque, we must have the release in proper form. We must be provided with a stamped original of the lien indicating the document number in the appropriate court where it is filed.

Please feel free to contact my office so that an appointment can be scheduled for this transaction.

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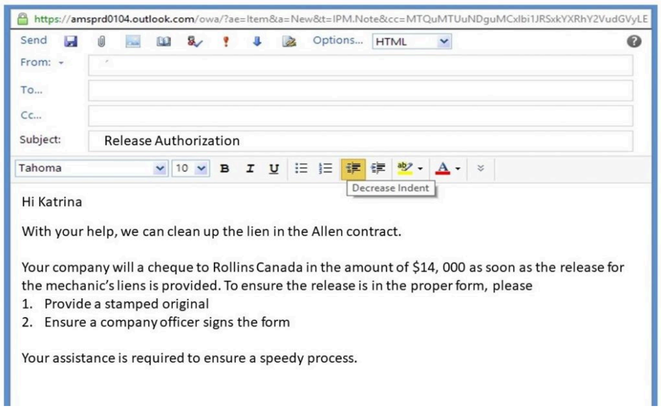

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Key Takeaways

- 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.
- Adapting your message to the audience increases your chance of effective communication.
- Highlighting reader benefits and using the "you" view are crucial motivators.

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 the one you wouldn't mind sharing). Include the original email in your submission.

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3.3 SELECTING APPROPRIATE CHANNELS

Learning Objectives

After studying this unit, you will be able to distinguish between communication channels to determine which is most appropriate for particular situations.

INTRODUCTION

The **medium or channel** is the vehicle of transmission for a message. Generally, several communication channels could communicate a message, but choosing the most appropriate channel will depend on the audience, the message, and the purpose of communication. When communicating a message, choosing from traditional communication channels: memos, letters, face-to-face (F2F) meetings, and telephone calls; as well as digital media: emails, text messages, videoconferencing, blogs, and websites are all options. The business writer must have a clear understanding of the audience to ensure the channel of communication will effectively communicate the message.

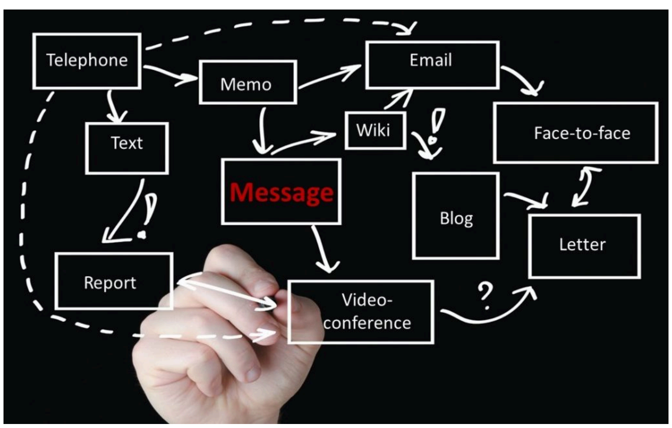

Figure 6.1: Choosing the best communication channel takes an in-depth understanding of the audience, the purpose and the message. ([Business Communications](), 2019).

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 6.1 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.

Selecting the Right Medium

Media can be categorized into four main types: **oral, written, visual, and electronic.**

Table 6.1 Types of Business Communication

Types	Description	Advantages	Disadvantages
Oral	Face-to-face communication including meetings, interviews, speeches, and presentations. F2F communication allows non verbal cues and immediate feedback between sender and receiver. Oral communication is most appropriate when delivering bad, sensitive, or personal news.	✓ Provides opportunity for immediate feedback ✓ Involves non-verbal cues ✓ Allows for immediate feedback and consensus building	× Provides no permanent record of communication × Reduces sender's control of message × Immediate feedback may not be constructive
Written	Written messages, other than digital, are used to communicate routine, day-to-day, information to audiences inside and outside of an organization. Memos, letters, reports, or proposals fall into this category.	✓ Provides permanent record ✓ Shared easily with large audiences ✓ Minimizes emotional reaction to message	× Delays feedback including non-verbal cues × Takes time and resources to distribute
Visual	Visual documents are communication formats in which one or more visual element play a central in conveying the message and are supported by small amounts of text. SlideDoc Reports and Infographic illustrations fall into this category.	✓ Conveys complex ideas ✓ Simplifies messages ✓ Reduces demand on receiver's time demand ✓ Provides permanent record	× Requires specialised skills and more time to produce × Increases difficulty to transmit and store
Digital	Electronic media have largely replaced printed messages in many companies. Some degree of technical skills is required to use this category. Blogs, wikis, and websites fall into this category.	✓ Delivers messages quickly ✓ Reaches large audiences ✓ Provides interactive media ✓ Provides permanent record	× Entails privacy and security risks × Requires specialised skill and time to produce

The advantages and disadvantages of the four categories of business communications. (Business Communication Essentials, 2016).

There are other considerations when choosing the exact channel to send a message. When is a written memo preferable to an electronic one? When is a text message more appropriate than a telephone conversation? Understanding what situation, message, and receiver require which specific channel is the topic of our next section.

Message formality: The choice of channel is a non-verbal cue that affects style and tone. For example, a memo or letter is for formal in tone and format than is a text or IM message.

Media Limitation: Some channels are more appropriate for certain messages. For example, a report will convey a more complex message than a text message or discussing sensitive information is more appropriate in a face-to-face meeting rather than over a text message.

Urgency: Be mindful of people's time. Messages that do not require immediate feedback can be communicated via email or voicemail rather than a f2f meeting or telephone conversation.

Cost: Some mediums are more costly than others. Cost is a non-verbal cue of importance. For example, communicating the importance of a change in company policy is more likely to be effective if shared in a f2f meeting than through a memo.

Choosing the wrong channel can result in a message that is less effective or even misunderstood.

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THE SPECTRUM OF COMMON WORKPLACE COMMUNICATION CHANNELS

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. Table 6.2 and the video that follows provides information on what medium is best used in what situation.

Table 6.2 Channel Selection Criteria

Channels	Best use
Face-to-Face	When you want to be persuasive, deliver bad or sensitive news, or share personal information.
Voice-Mail	For simple and brief messages. When sender of information does not need an immediate response.
Telephone	When face-to-face interaction is not necessary, however, sender needs an immediate response
Text	Different time zones, written record is necessary, email is not available or appropriate.
Email	Different time zones, written record is necessary, communicating with a large group, can replace hard copy memo or letter.
Video/Tele conference	When group interaction is required, but group is geographically dispersed.
Memo	Communicating inside an organization, non sensitive company information, company policy, company procedure(s)
Letter	Communicating external to organization, non sensitive and non-complex information.
Report/ Proposal	Used for internal and external communication. Communicating complex or extensive ideas and initiatives.
Online forums/site	To share ideas with wide audience, to provide opportunity for interaction with and revision of information.

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Example: When to Select the Email Channel

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 6.2 charts out the decision-making process for selecting the most appropriate channel among the 10 given in Table 6.2 above.

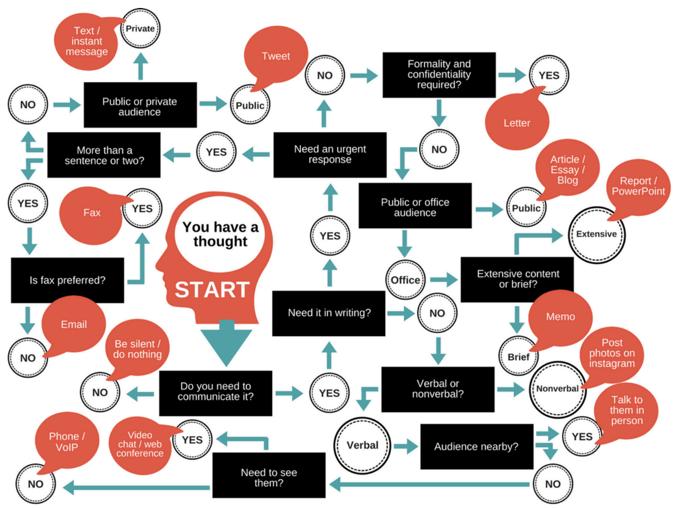

Figure 6.2: Channel Selection Process Flow Chart

Access an interactive version of the Channel Selection Flow Chart Here

We will examine the uses, misuses, conventions, and implications of these channels in the chapters ahead. 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 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 office mates 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.

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CHAPTER 4 THE WRITING PROCESS: RESEARCHING

OVERVIEW

Once you've identified your purpose for writing, profiled your audience, and selected the appropriate channel, 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.

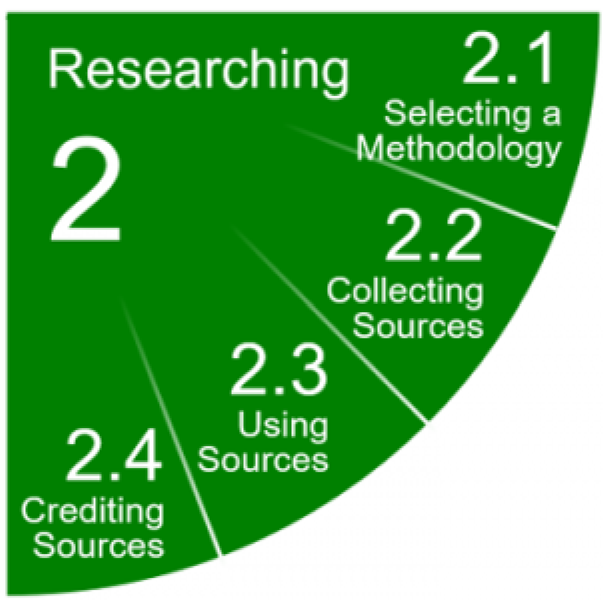

Figure P3.1: The four-stage writing process and Stage 2 breakdown


4.3
Proofreading for Grammar, Punctuation, Spelling, and Mechanics
1.1
Purpose
1.2
Audience
4.2
Reorganizing, Adding, and Trimming
4
Editing
1
Preparing
1.3
Channel
4.1
Evaluating
3.4
Document Design
Drafting
3
Researching
2
2.1
Selecting a Methodology
3.3
Stylizing Sentences & Paragraphs
2.2
Collecting Sources
3.2
Outlining
3.1
Organizing
2.3
Using Sources
2.4
Crediting Sources

4.1 CHOOSING A RESEARCH METHODOLOGY

Learning Objectives

After studying this unit, you will be able to

- determine the appropriate research methodology that meets the needs of the audience
- distinguish between formal and informal research

INTRODUCTION

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.

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RESEARCH METHODOLOGY

Informal Research

You conduct informal research when you look up information and deliver share that information in an email or letter without the need to formally cite the source is **informal research**. It is by far the most common type of research in business. Every professional conducts informal research several times a day in routine communication with various audiences. Say your manager emails asking you to recommend a new printer to replace the one that's not working. 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. This type of research will is information.

Formal Research

On the other hand, formal research takes a more systematic approach to collect information. Formal research requires the source of information compiled during the research phase is documented using a conventional citation and reference system designed to make it easy for the audience to verify information credibility.

Formal research is more scientific. Let's return to the Ricoh example. Using formal research to find out which printer is best now involves determining printer criteria including capabilities, cost, warranty, service plan, and availability. Next, you may read the product webpages, specification manuals, customer reviews, and reviews on several printers to get a clear idea of the pros and cons. Finally, you test the printers yourself, score them according to your assessment criteria, rank the best to worst, and report the results.

Formal research requires more time, labour, practice, skill, and resources. 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 a difficult situation. 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.

Primary Research

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 information.

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. Primary research is labour-intensive, typically expensive.

Secondary Research

What most people do—especially students—when they conduct research for an academic or professional tasks is secondary research. Secondary research involves finding and using information that already exists. To use the printer example above, accessing the *Consumer Reports* article and using its recommendation to make a case for office printer selection is secondary research.

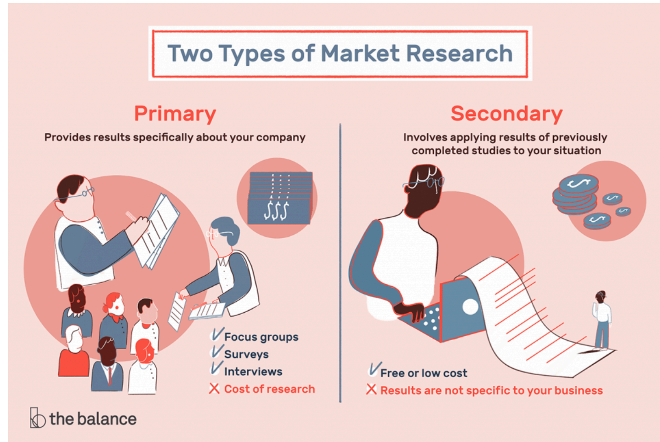

Figure 7.1: A brief overview of the characteristics of primary and secondary research (The Balance, 2019)

The easiest, most common, and most expedient research, the kind that the vast majority of informative workplace communication involves is **informal secondary research**. However, when you do a school research assignment or if your manager requires you to cite the source, then **formal secondary** research is required. In business, formal secondary research 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, 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?

REFERENCE

Bahir, F. (2015). Intro to research methods [Video File]. Retrieved from https://www.youtube.com/watch?v=kB4gKoS4MNw.

Figure 7.1. Infographic. Adapted from “Two types of market research,” by M. Buttignol, 2019, *The Balance.* Retrieved from https://www.thebalancesmb.com/differences-primary-and-secondary-research-2296908. Copyright 2019 by The Balance.

4.2 LOCATING CREDIBLE SOURCES

Learning Objectives

After studying this unit, you will be able to

- locate, select and organize relevant and accurate information drawn from a variety of sources

INTRODUCTION

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 credibility, whereas using suspicious sources—perhaps because they were the top results of a Google – undermines your 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[1]. Building the

Figure 8.1: A writer's credibility and authority is dependent on the ability to separate facts from fiction ([USA Today,](#) 2020).

1. White, A. (2017, January 10). Fake news: Facebook and matters of fact in the post-truth era. Ethics in the News: EJN Report on

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 are 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.

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https://pressbooks.nscc.ca/nscccommtrades/?p=67#h5p-18

ASSESSING THE CREDIBILITY OF PRINT SOURCES

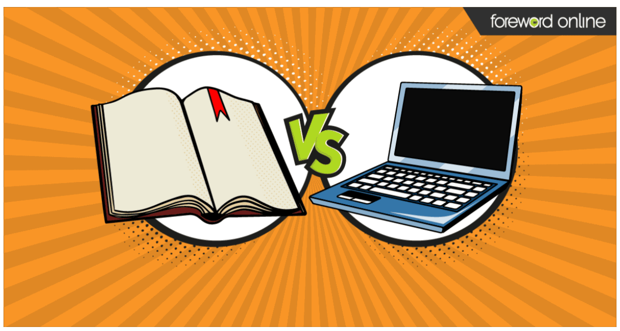

Figure 8.2: Understanding the difference between print and digital media is important to develop good research skills (Reese, 2018).

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[2], 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:

- Author credentials

Challenges for Journalism in the Post-truth Era. Retrieved from http://ethicaljournalismnetwork.org/resources/publications/ethics-in-the-news/fake-news

2. Cook, J., et al. (2016, April 13). Consensus on consensus: A synthesis of consensus estimates on human-caused global warming. Environmental Research Letters 11, 1-7. Retrieved from http://iopscience.iop.org/article/10.1088/1748-9326/11/4/048002/pdf

- Currency
- Author objectivity
- Publisher quality
- Peer review
- Writing quality
- References

- **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 or blog 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.
    - 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 the audience will become suspicious. 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, conspiracy theories, or climate change-denying literature. Likewise, if you see that the source is sponsored and/or promoted by special interests like Big Oil or an 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.

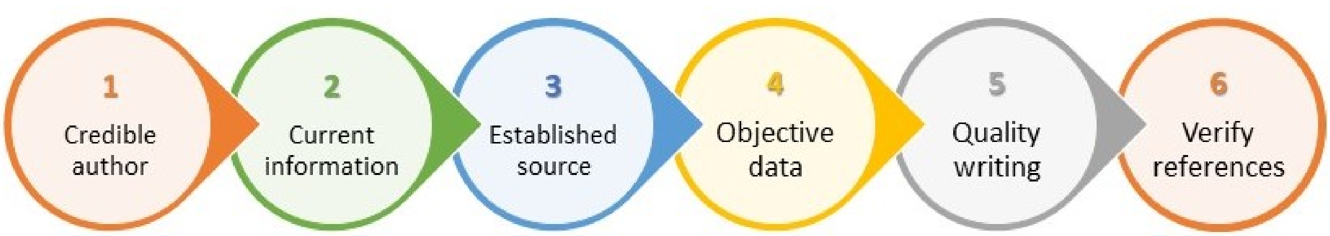

Figure 8.3: Six guidelines to help you select the best research sources.

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[3]. *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.

A *Wikipedia* article can be a good place to start 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 Assessing the Credibility of Print Sources.

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 been updated, 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.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=67#h5p-19

3. Wikipedia. (2015, December 17). General disclaimer. Retrieved from https://en.wikipedia.org/wiki/Wikipedia:General_disclaimer

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 Assessing the Credibility of Print Sources 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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4.3 COLLECTING SOURCES BY READING WITH A PURPOSE

JORDAN SMITH, MELISSA ASHMAN, ECAMPUSONTARIO, BRIAN DUNPHY, AND ANDREW STRACUZZI

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 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[1]. 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**

1. Freedman, L. (2012). Skimming and scanning. Writing Advice. Retrieved from http://advice.writing.utoronto.ca/researching/skim-and-scan/

bibliography lists full bibliographical entries and a proper summary under each entry; 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.

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[2], 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 when we continue examining the process of building a document around research,

2. 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

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, 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.

4.4 USING SOURCE TEXT: QUOTING, PARAPHRASING, AND SUMMARIZING

Learning Objectives

After studying this unit, you will be able to

- quote source text directly with accuracy and correct punctuation
- paraphrase, summarize and reformat information collected from written materials

INTRODUCTION

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 using those sources as evidence. When you incorporate outside research into your writing, you must cite that information to ensure the reader knows what information is based on research sources. As with other areas of business writing, incorporate information from print or digital research into usable evidence takes skill and practice.

You essentially have four ways of using research material:

- **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

Figure 4.4.1: Research can be incorporated into your writing in one or all of these strategies.

In each case, acknowledging your source with a citation at the point of use and following-up with bibliographical reference at the end of your document is essential to avoid a charge of plagiarism. The following video provides a few tips on the why, where, and when of good citation practice.

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https://pressbooks.nscc.ca/nscccommtrades/?p=71#h5p-20

Let's now look at each of these research strategies in turn.

RESEARCH STRATEGIES

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 word-for-word information from an original source, puts quotation marks (" ") around that information, and embeds it into your writing. 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 (" ").
- **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 to 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 [1]
    - 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 interesting 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

1. Hacker, Diana. (2006). The Bedford handbook (7th ed.). New York: St. Martin's. Retrieved from https://department.monm.edu/english/mew/signal_phrases.htm p. 603

paraphrase properly (see paraphrasing sources below) than to quote and to source that paraphrase.

- **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 the left margin, not use quotation marks, 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.
- **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. Using more quotes will suggest that you're using quotations to write your document. 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.
- **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. For more on quotations, consult How to Use Quotation Marks page and complete the online quiz.

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https://pressbooks.nscc.ca/nscccommtrades/?p=71#h5p-21

Paraphrasing Sources

Paraphrasing or "indirect quotation" is putting research information in your own words. Paraphrasing is the preferred way of using a source when the original wording isn't important. This way, you can incorporate the ideas and tailor the wording so it is consistent with your writing style and your audience's needs. Also, paraphrasing a source into your own words proves your advanced understanding of the research information.

Only paraphrase short passages and ensure the paraphrase faithfully represent the source text by containing the same meaning as in the original source in about the same length. Remember, **a paraphrase is as much a fact as a direct quotation**. Therefore, your paraphrase must accurately reflect the information in the original text. As a matter of good writing, you should try to streamline your paraphrase so that it tallies fewer words than the original passage while still preserving the original meaning. In addition, **a paraphrase must always be introduced**. Since a paraphrase does not have visual cues to separate it from your writing, the reader must know when the paraphrase begins, for example with the phrase, "according to the author" and where the paraphrase ends, for example with a citation of the source.

For example: According to the author, paraphrasing can be challenging (author, year).

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 students whose general writing skills are still developing. A common mistake that students make when paraphrasing is to go only partway towards paraphrasing by substituting 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 is considered plagiarism. Consider, for instance, the following botched attempt at a paraphrase of the Lester (1976) passage that substitutes 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 a 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 change 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.
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.

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> https://pressbooks.nscc.ca/nscccommtrades/?p=71#h5p-22

For more on paraphrasing, consult the *Purdue OWL* Paraphrasing learning module[2] and Exercise.

Summarizing Sources

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

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 complex concepts in a way non-experts can understand. Adapting the message to such audiences requires brevity and the ability to translate jargon-heavy technical details into plain, accessible language.

Summarizing is thus paraphrasing only the highlights of the original source. Like paraphrasing, a summary re-casts the original information in your own words and **must be introduced**; unlike a paraphrase, a summary is significantly shorter than the original text. A summary can reduce a whole novel, article, or film to a single-sentence.

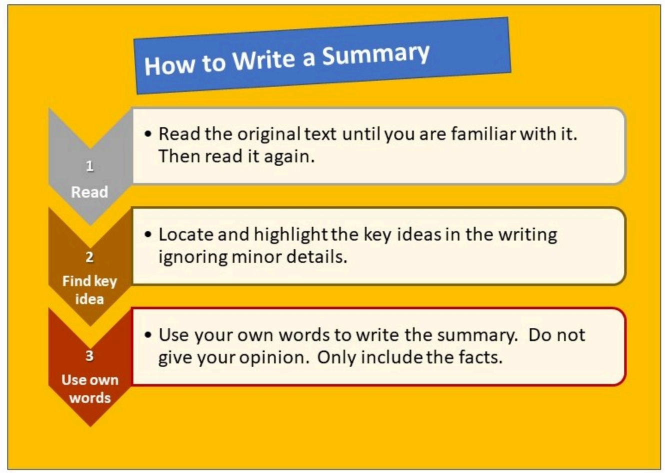

Figure 4.4.2: How to write a summary in three simple steps.

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 collecting sources above on reading for main points and 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 paraphrasing sources 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, but basically, it involves arranging your integrated research material in a coherent fashion, with main points upfront 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.

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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 paraphrasing sources above. In other words, if Exercise 1 above was a direct quotation, now try indirect quotation for each passage.
3. Following the six-step procedure outlined in summarizing sources 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.

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/

Conrey, S. M., Pepper, M., & Brizee, A. (2017, July 25). *How to use quotation marks*. Purdue OWL. Retrieved from https://owl.english.purdue.edu/owl/resource/577/01/

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PPCC Writing Center elearning Series. (2016). *Part 2 Quoting* [Video file]. Retrieved from https://www.youtube.com/watch?v=do921cAEL6o&t=51s

4.5 DOCUMENTING SOURCES IN APA

Learning Objectives

After studying this unit, you will be able to

- integrate and document information using commonly accepted citation guidelines

INTRODUCTION

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.

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 placing 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 deceive 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 sneaking research in and ending 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 doing it and few get caught[1] 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.

Figure 4.5.1: Image of Jill Abramson, former editor of the New York Times, who has been accused of plagiarism in her latest book (BBC.com, 2019).

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) finds it through a simple Google search, Google Alerts notification, reverse image search, or digital watermarking notification [2]. 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[3], and acts of plagiarism have indeed ruined perpetrators' careers when they're caught, which is easier than ever[4].

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 third-party software (like Turnitin and SafeAssign) that produces originality reports showing the percentage of assignment content copied from sources

1. Helbig, K. (2014, April 20). 11 numbers that show how prolific illegal downloading is right now. *Public Radio International*. Retrieved from https://www.pri.org/stories/2014-04-20/11-numbers-show-how-prolific-illegal-downloading-right-now
2. Rose, O. (2013, August 16). 5 easy to use tools to effectively find and remove stolen content. *Kissmetrics*. Retrieved from https://blog.kissmetrics.com/find-remove-stolen-content/
3. SecureYourTrademark. (2015, July 13). 71 notorious patent, trademark, and copyright infringement cases. https://secureyourtrademark.com/blog/71-notorious-patent-trademark-and-copyright-infringement-cases/
4. Bailey, J. (2012, August 21). 5 famous plagiarists: Where are they now? *PlagiarismToday*. Retrieved from https://www.plagiarismtoday.com/2012/08/21/5-famous-plagiarists-where-are-they-now/

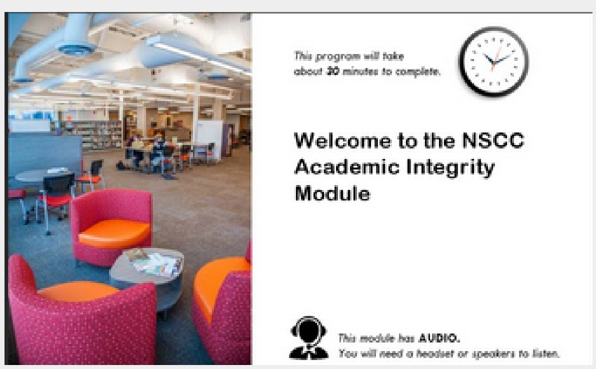
found either on the public internet or in a global database of student-submitted assignments. That way, assignments borrowed or bought from someone who's submitted the same or similar will also be flagged.

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 identify in hardcopy assignments. 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" 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.



NSCC Academic Integrity Module

This interactive tutorial will:

- outline your responsibilities related to academic integrity

- help you understand and avoid issues of plagiarism and academic misconduct
- describe how to properly cite your sources
- direct you to valuable resources and tools

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 NSCC Libraries Academic Integrity Guide, plagiarism.org, and the *Purdue OWL* Avoiding Plagiarism series of modules.

CITING AND REFERENCING SOURCES IN APA STYLE

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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 (APA)** 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[5].

Its placement tells the reader that everything between the signal phrase and citation is either a direct or indirect quotation of the source, and everything after (until the next signal phrase) is your own

5. (Smith, 2018, p. 66)

writing and ideas. As you can see above, the three pieces of information in the citation are author, year, and location.

Figure 4.5.2: All in-text citations must have a corresponding entry on the reference list at the end of the document.

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 4.5.1 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 4.5.1 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 4.5.1 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 4.5.1 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[6]).

2. **Year of Publication**

- The publication year follows the author's surname either in parentheses on its own if in the signal phrase (see the odd-numbered Examples in Table 4.5.1 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**

- 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 4.5.1 shows how these guidelines play out in sample citations with variables such as the

6. (as cited in Whaley, 1977, p. 64

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 4.5.1: 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 *Elements of Style* 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 *Purdue OWL* advises that "successful use of quotation marks is a practical defense against accidental plagiarism" (Conrey, Pepper, & Brizee, 2017, ¶ 1). . . . The *OWL* 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	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 NSCC Libraries APA Citation Guide, and Purdue OWL's In-Text Citations: The Basics and its follow-up page on authors.

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https://pressbooks.nscc.ca/nscccommtrades/?p=78#h5p-25

THE REFERENCES LIST

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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.

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:

Example: 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 of 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:

Example: 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:

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

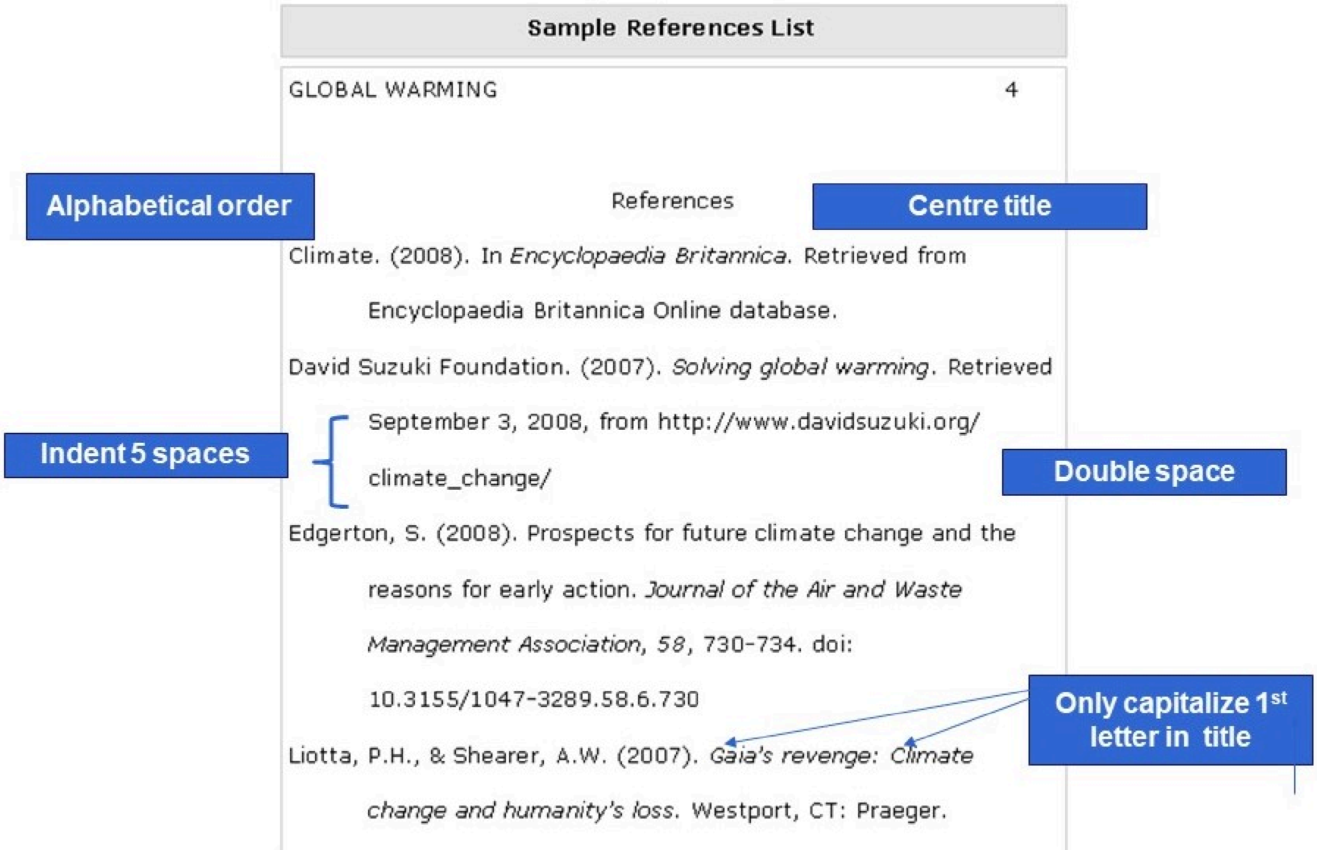

Figure 4.5.3: Template reference list demonstrating some of the key characteristics.

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 the 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's 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 the 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"[7]
    - Reference List: Basic Rules[8] 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.
- **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:** double-space the entire document
    - The reference list is evenly spaced. Institutions, publishers, and employers follow this style.
- **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

7. American Psychological Association (APA). (2018). The Basics of APA style: Tutorial. Learning APA Style. Retrieved from http://www.apastyle.org/learn/index.aspx

8. Paiz, J. M., Angeli, E., Wagner, J., Lawrick, E., Moore, K., Anderson, M., Soderlund, L., Brizee, A., & Keck, R. (2017, October 2). Reference list: Basic rules. Purdue OWL. Retrieved from https://owl.english.purdue.edu/owl/resource/560/05/

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 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.

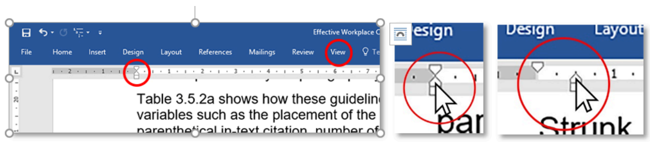

Figure 4.5.4: Tabbing a References list by making the left-margin tab visible, clicking on the bottom triangle, and dragging it a half-centimeter to the right

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https://pressbooks.nscc.ca/nscccommtrades/?p=78#h5p-27

CITING IMAGES AND 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. However, that would be classic plagiarism. To avoid plagiarism, the student should determine if they're permitted to use the image then cite it properly.

Whether you've been granted permission or own the image yourself, you must still credit the source of the **image** just like when you quote directly or indirectly. Just because a photo or graphic is on the internet doesn't mean that it's for the taking; every 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[9], but contacting the owner and asking permission is still the safest course of action. The 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

9. 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/

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:

- Labeled immediately below with a figure number given in consecutive order along with other images in your document
- Described briefly with a caption that also serves as the image's title
- Attributed with the 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"[10].

Even if you retrieve the image from public domain archives such as the Wikimedia Commons (see Figure 4.5.5), you must indicate that status along with the other information outlined above and illustrated below.

Figure 4.5.5: 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, a more concise citation might be more appropriate. The citation below an image on a PowerPoint slide could thus look more like:

10. 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

Source: "Algonquines" (2008)

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

Example: 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:

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

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"[11]. 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:

Example: 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. For more, see the images page on the NSCC Copyright Guide 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.

Key Takeaways

- Cite and reference each source you use in a research document following the documentation style conventions adopted by your field of study.
- Always cite external research: text, images, and video, print or digital

Exercises

Write a short paragraph that summarizes the unit using proper APA style and a complete reference.

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CHAPTER 5 THE WRITING PROCESS: DRAFTING AND EDITING

OVERVIEW

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 depends on how effectively you've organized your message.

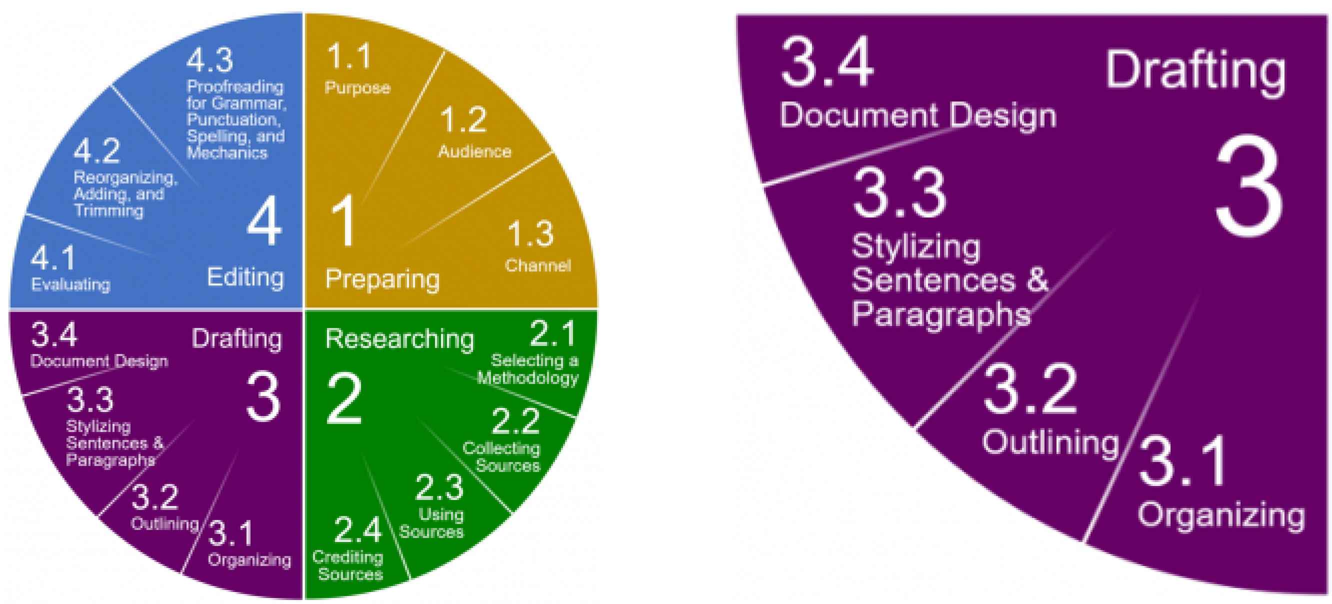

Figure: The four-stage writing process and Stage 3 Breakdown

5.1 CHOOSING AN ORGANIZATIONAL PATTERN

Learning Objectives

After studying this unit, you will be able to recognize and apply standard patterns of message organization.

INTRODUCTION

The shape of your message depends on the purpose. As discussed previously, business communications can have three purposes: to inform, to persuade, or promote goodwill. Without a clear plan to achieve the intended purpose, readers can get lost and confused. That is why business writing has standard patterns of organization to structure thoughts and messages to make them understandable to the receiver.

Most business messages follow a three-part structure that accommodates the three-part division of our attention spans and memory:

Attention-grabbing opening: The opening hooks the reader in to keep reading by capturing their attention. In longer messages, the opening includes an introduction that establishes the framework in which the reader can understand everything that follows.

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 the main point/idea
- Background for better understanding
- Detailed explanations or instructions
- Convincing rationale in a persuasive message

This information is crucial to the audience's understanding of and commitment to the message. Our memory typically blurs these details, however, so having them written down for future reference is important. 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.

Wrap-up and closing: The closing completes the coverage of the topic and may also point to what's next, such as cues to what action should follow the message (e.g., what the reader is supposed to do in response to a letter, such as a 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 effective writer loads the message with important points both at the opening and closing of a document because the reader will focus on and remember what they read first and last.

ORGANIZING PATTERNS

Business communications use two main message patterns: **Direct Messages, Indirect Messages,** while bearing in mind to follow the general three-part structure discussed above. Learning these patterns is valuable to reduce confusing and disorganized messages. Anyone can become a clearer and more coherent *thinker* by learning to organize messages consistently according to well-established patterns.

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DIRECT MESSAGES

The **direct approach** frontloads the main point, which means getting right to the point in the first or second sentence of the opening paragraph. The direct approach is used when you expect the audience to be pleased, mildly interested, or have a neutral response to the message. Positive, day-to-day, and routine messages use the direct organizing pattern. The explanation and details follow in the body paragraph. Getting to the main idea saves the reader time by immediately clarifying the purpose of communication and thus reduces receive frustration.

Since most business messages have a positive or neutral effect, business writers should become very familiar with this organizing pattern. Frontloading a message accommodates the reader's 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.

INDIRECT MESSAGES

While the direct approach leads with the main point, the **indirect approach** strategically moves the main idea deeper in the message. The indirect approach is used for delivering bad, unwanted, or sensitive news. When you expect the reader will be resistant, displeased, upset, shocked, or even hostile towards the message, the direct approach would come off as overly blunt, tactless, and even cruel.

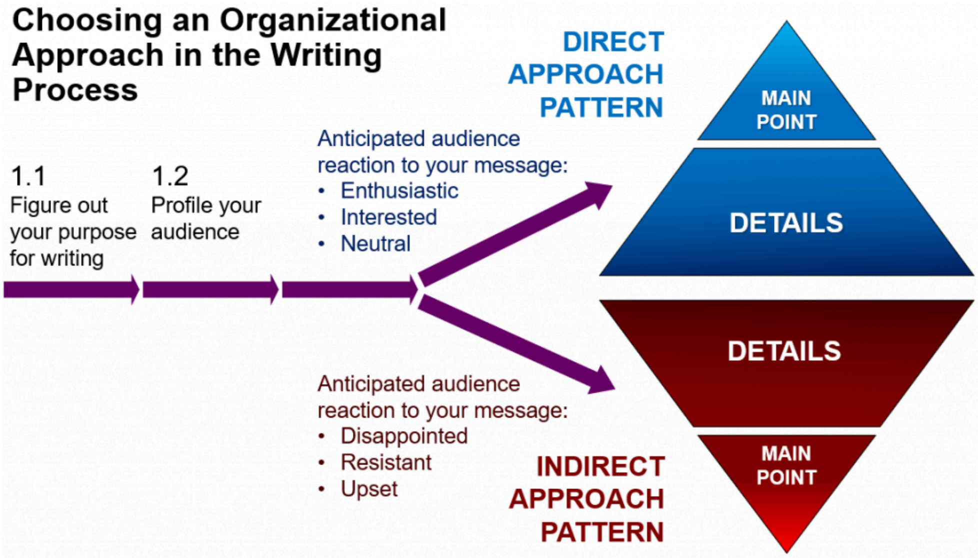

Figure 5.2.1: The two main business writing organizing patterns and when they should be used. ([Business Communications](#), 2019)

The goal of indirect messages is to use the opening paragraph and some of the body area to ease the reader towards an unwanted or upsetting message. Thus, the indirect approach will first provide an explanation or justification, before delivering the main idea. This organizing pattern allows the reader to become interested enough to read the whole message. 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.

Persuasive Messages: All persuasive message follows the so-called **AIDA** approach:

1. **Attention**-grabbing opener
2. **Interest**-generating follow-up
3. **Desire**-building details
4. **Action** cue

Nearly every commercials follow this general structure, which is designed to keep you interested while enticing you towards a certain action such as buying a product or service. 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 body paragraphs.

Negative Messages: Likewise, a bad-news message starts by presenting the bad news after an explanation or justification of the bad news is presented. The typical organization of a bad-news message is:

1. **Buffer** offering some good news, positives, goodwill, 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 softens 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 5.2.1.: 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 the textbook.

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https://pressbooks.nscc.ca/nscccommtrades/?p=83#h5p-29

ORGANIZING PRINCIPLES

Several message patterns are available to suit your purposes for writing both direct and indirect-approach messages, 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. 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.

These organizing principles are identified, explained, and exemplified in Table 11.2 below. Checking out a variety of websites to see how they use these principles effectively will provide a helpful guide for how to write them. These basic structures can provide readers with a recognizable form that will enable them to find the information they need.

Table 5.2.2: Ten Common Organizing Principles

Organizing Principle	Structure & Use	Example
1. Chronology & 5W+H	• 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	Wolfe Landscaping & Snowblowing began when founder Robert Wolfe realized in 1993 that there was a huge demand for reliable summer lawncare 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. 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.
2. Comparison & Contrast	• 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 related things	Wolfe Snowblowing goes above and beyond what its competitors offer. While all snow blowing services will send a loader-mount snowblower (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 snowbank 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. 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.
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 6 a.m. 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	- Detailed description of the connection between two or more events, actions, or things to show how they relate - For an analysis of the causal connection between things	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 5 cm 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 snowblower returns shortly after to clear the snowbank formed by the city plow at the end of your driveway.
6. Process & Procedure	- 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	Ordering our snow removal service is as easy as 1 2 3: - Call 1-800-555-SNOW or email us at info@wolfelandscaping&snow - 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.?) - 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	- 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	Wolfe Landscaping & Snowblowing provides a reliable snow-removal service throughout the winter. We got you covered for any snowfall of 5 cm or more between November 1st and April 15th. Once accumulation reaches 5 cm 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 snowblower scrapes your driveway and redistributes the snow evenly across your front yard in less than five minutes.
8. Definition & Example	- 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 snowblower (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	• A bullet-point listing of various connected but unprioritized points supporting the main point preceding them • For breaking down an explanation in a reader-friendly point-by-point presentation such as an FAQ page	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: • Clearing and salting your driveway with every 3 cm 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 3 cm+ snowfall or freezing rain • Shoveling by request any other walkways on your property
10. Testimonial	• First-person account of an experience • For offering a perspective that the reader can relate to as if they were to experience it themselves	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 snowbank made by the city plow whenever it snowed while we were at work. Wolfe was the better service by far."

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 11.2 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

Houng, D. (2019). *Direct and indirect approaches* [Video file]. Retrieved from https://www.youtube.com/watch?v=L-uB33AfqMo

5.2 OUTLINING YOUR MESSAGE

Learning Objectives

After studying this unit, you will be able to

- apply outlining techniques to drafting documents

INTRODUCTION

Once the organizing principle has been determined, create an **outline** for the message. An outline will help plot the bare-bones structure of the message so it can be fleshed out into full sentences and paragraphs. Outlining helps writers get past one of the most terrifying moments in the writing process: 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 or thinking that the first draft has to be perfect. 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.

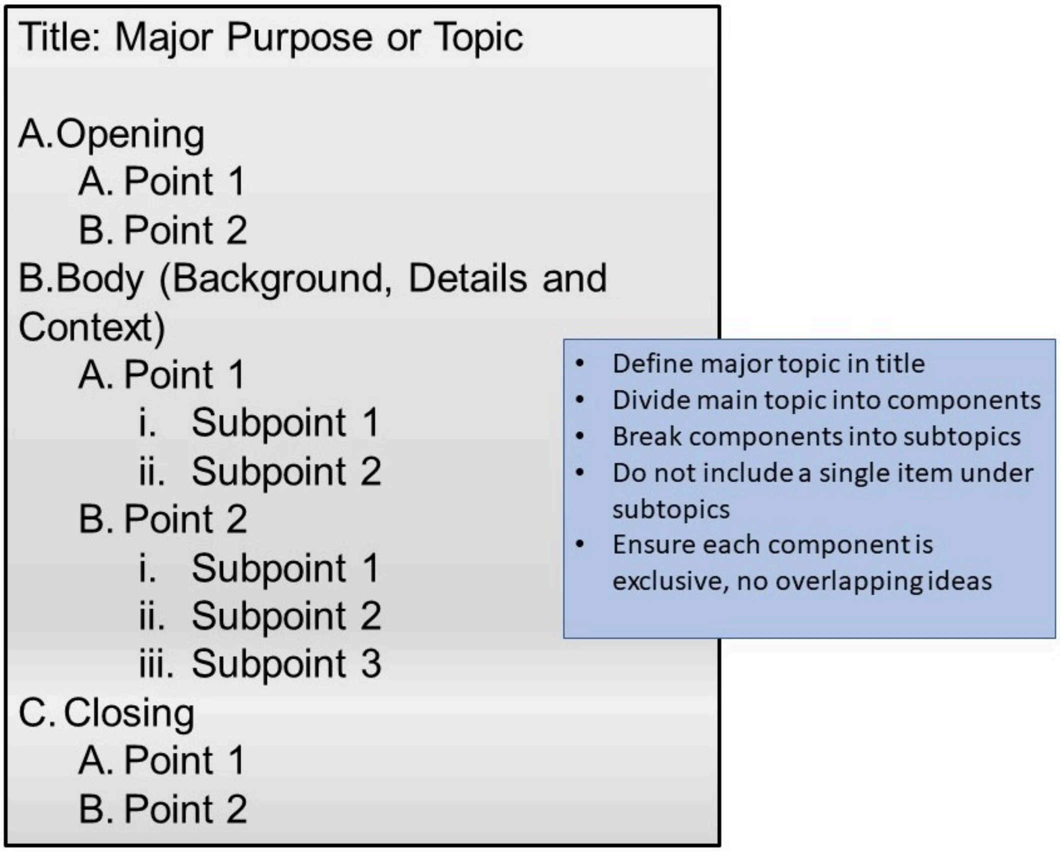

Figure 5.3.1: A template of an alphanumeric outline.

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:

You can add further points in the body and, as shown in the middle of Figure 5.3.1, subdivide them even further with lowercase roman numerals, regular numbers, lowercase letters, etc. depending on the size of the document and the support needed. View the video *Outlines*, by UNC Writing Center for an overview of the outlining process.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=87#h5p-30

Table 5.3.1 presents an outline of an email message for someone who wants to subscribe to a snow-removal service. The draft of the email message is also presented to demonstrate how to move from the outline to the completed product.

Table 5.3.1: Brief Message Outline as a Basis for an Email Draft

Message Outline	Email Message Draft

1. **Interested**
2. **Our details**
  a. **address**
  b. **driveway**
3. **Questions:**
  a. **prepaid cost vs. one-time?**
  b. **discounts?**
	Greetings! I am interested in your snow-removal service this winter. We're at 5034 Tofino Crescent, and our driveway can fit four cars, so how much would that come to for the prepaid service?
	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?
	Warm regards,
	Christine Cook

Once an outline is in place, the details of each point can be fleshed out into full sentences and other conventional message components as well.

The specific architecture of the outline depends on the organizing principle chosen as appropriate to convey the writing purpose. Table 12.2 below demonstrates three principles.

Table 5.3.2: Outline Possibilities Based on Organizing Principles

Organizing Principle	Outline
1. Chronology & 5W+H	I. Past A. Founding: who, when, what, and why B. Origin and expansion: where, when, and how II. Present A. Coverage: where B. Technology: what III. Future: where and when
2. Comparison & Contrast	I. Main idea: Wolfe is better than the competition II. Background context/details: Comparison-Contrast A. Comparison: what all companies do—clear your driveway B. Contrast: how Wolfe does it better 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	I. FAQ: Why get snow removal? II. Pros & Cons A. Advantages i. professional driveway clearing ii. 24/7 service iii. saves time iv. avoids injury B. Disadvantages i. expense ii. potential property damage III. Concluding recommendation: get the service

As we shall see later in the textbook, outlining is key to organizing other projects such as presentations and reports. Outlining keeps you on track and prevents wasted efforts.

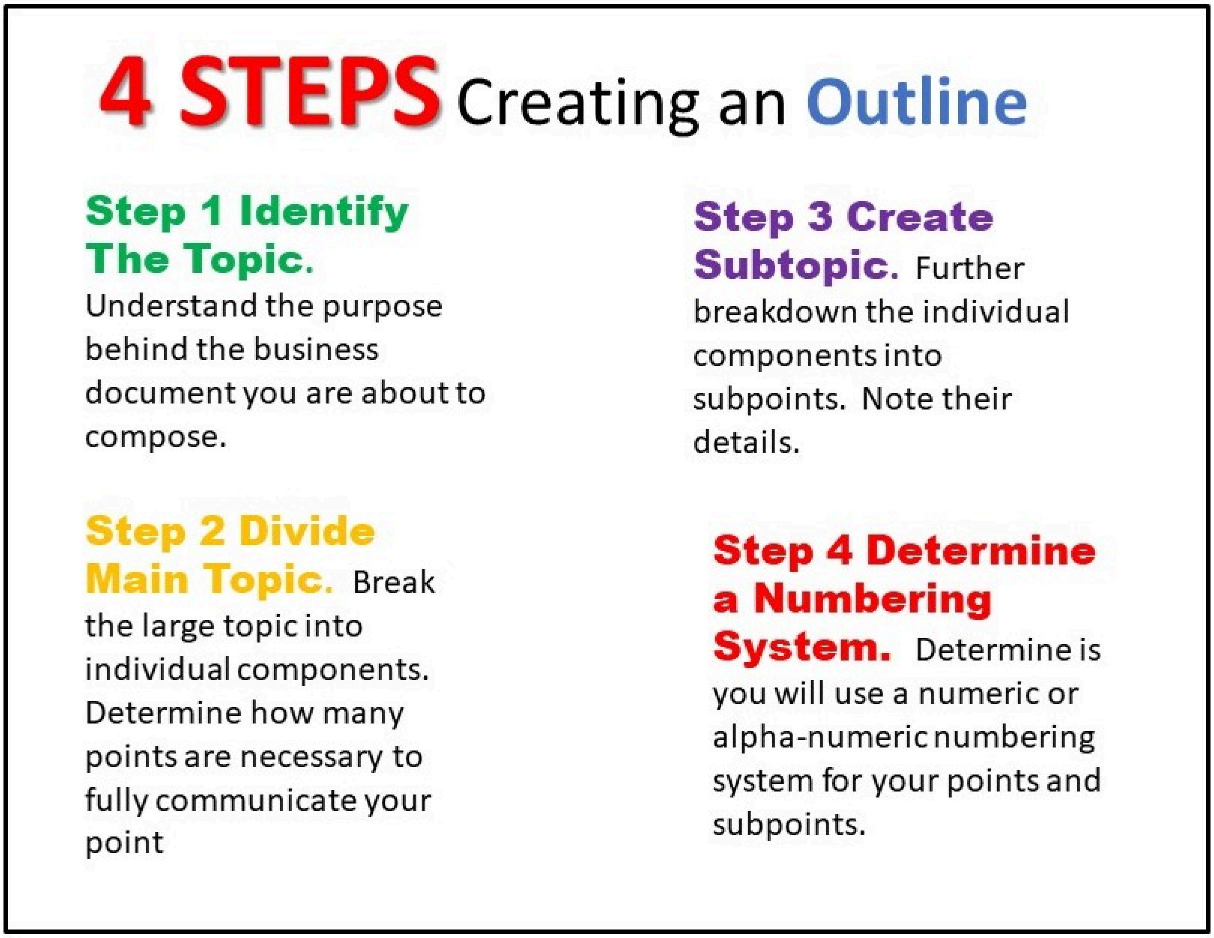

Figure 5.3.2: Four steps to creating effective outlines.

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?

5.3 STANDARD BUSINESS STYLE

Learning Objectives

After studying this unit, you will be able to

- edit your writing using elements of business writing style
- apply the 6 C's of business writing
- ensure your writing has the correct tone

INTRODUCTION

Among the most important skills in communication is to adapt your writing style according to the audience to meet their needs as well as your own. Different audiences: a co-worker, the manager, the customer, required different communication styles. In each case, these audiences have certain expectations about the style of communication, and writers must meet those expectations to be respected and maintain good relations. This section reviews writing style choices and focuses especially on the six major characteristics of good writing common to both formal and casual writing.

Watch the*Baroness von Sketch Show Work emails skit.*

A YouTube element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=96

THE FORMALITY SPECTRUM

There is a general choice between a formal and informal style of writing based on audience profile considerations. Certain situations call for formal writing and others for a more relaxed style and saw 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.

Formal Style in Writing

Because a formal style of writing shows respect for the reader, use standard business English especially if your goal is to create goodwill with your audience, such as anyone outside your organization, higher than you within your organization, and those on or around your level with 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 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.

Conversational Style in Writing

Your ability to gear-down to a more casual/conversational style is necessary for any situation when 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. In a routine email to a colleague, for instance, you would use the informal vocabulary exemplified in the semi-formal/common column of Table 5.1, 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*. 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 conversational 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 conversational 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.

Overly Formal	Conversational
All employees are herewith instructed to return the appropriately designated contracts to the undersigned.	Please return your contracts to me.
Pertaining to your order, we must verify the sizes that your organization requires prior to consignment of your order to our shipper.	We will send your order as soon as we con-firm the sizes you need.

Figure 5.3.1: Knowing when and how to communicate in a conversational style is important to communicate effectively with specific audiences. ([Business Communications](), 2019)

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. Since 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 such as:

> *Fo sho i set u up real good, well get yr car cleen smoove 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 will probably look for another company with a more business-appropriate style that suggests greater attention to detail and awareness of professional communication standards. A more appropriate response is likely to 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.*

In terms of the writing process, professionals should generally avoid slang style in almost all business situations. If slang *is* your style, it's in your best interests to bring your writing habits up to the casual/conversational level with constant practice. Perhaps slang-heavy style would be appropriate when texting a trusted colleague or marketing to teens, but generally, slang should be avoided because it tends to deviate from the typical characteristics of good business writing.

Unprofessional	Professional
Hey, boss, Gr8 news! Firewall now installed!! BTW, check with me b4 announcing it.	Mr. Smith, our new firewall software is now installed. Please check with me before announcing it.
Look, dude, this report is totally bogus. And the figures don't look kosher. Show me some real stats. Got sources?	Because the figures in this report seem inaccurate, please submit the source statistics.

Figure 5.3.2: A comparison of unprofessional writing littered with slang expressions and business-appropriate language. ([Business Communications](), 2019)

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[1], 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.

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[2]. 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

However, in any of the above cases, it would probably be safe to mirror the use of emojis after

1. Pringle, R. (2018, March 18). Emojis are everywhere and they're changing how we communicate. CBC News. Retrieved from http://www.cbc.ca/news/technology/emojis-forever-pringle-1.4577456
2. Pringle, R. (2017, May 26). Using the wrong emoji can cost you—literally. CBC News. Retrieved from http://www.cbc.ca/news/opinion/emoji-lawsuit-1.4131697

your correspondent gives you the greenlight by using them first[3]. 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, 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.

THE 6 CS OF STYLE

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

- 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; it doesn't confuse them with ambiguities or 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. Let's begin with a video presentation before focusing on each of the Six-Cs.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=96#h5p-31

1. Clarity

Clarity in writing means that the words on the page are like a perfectly transparent window to the author's meaning. Business or technical writing has no time for anything that requires the reader

3. Caramela, S. (2018, February 5). Put a smiley on it: Should you use emojis in business communication? Business.com. Retrieved from https://www.business.com/articles/put-an-emoji-on-it-should-you-use-emojis-in-business-communication/

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, if 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.

Confusion and misunderstanding based on unclear expressions and language can be avoided if hard facts, precise values, and specific pronouns, and concrete descriptions are used. Figure 13.3 demonstrates the use of these strategies to achieve clarity in writing.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=96#h5p-32

2. Conciseness

The principle that business writing is **economical** means to communicate ideas in as few words as possible without compromising clarity. Bad writing makes simple things sound complicated. This is a rookie mistake among some students new to college or employees new to the workforce. Writing long and complex sentences is likely to frustrate audiences.

Readers expect to receive information that gets directly to the point directly. Employees, customers, and other stakeholders want to receive concise messages. Concise writing presents a better understanding of information to readers. Figure 13.4 illustrates the benefits of this principle for consumers.

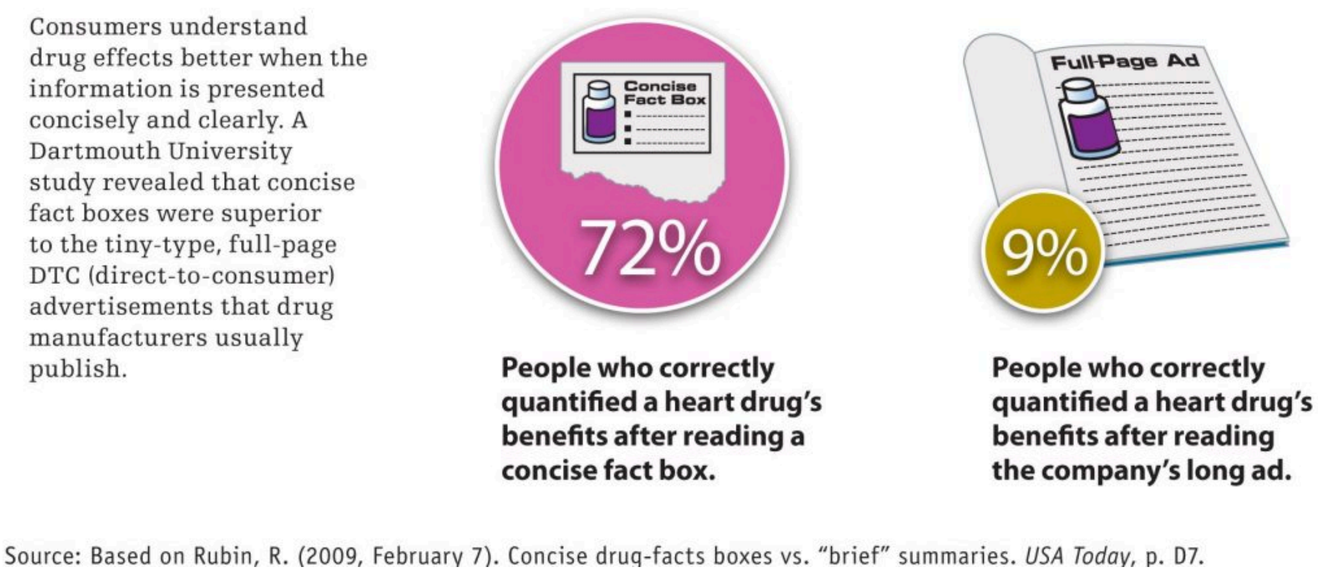

Figure 5.3.3 The benefits of concise writing include greater public awareness. ([Business Communications](#), 2019).

When In the writing process, time spent upfront eliminating wordy phrases will benefit the reader and create a feeling of goodwill towards the sender. Figure 5.3.4 presents several strategies to achieve concise writing.

Strategies	Examples
Eliminate long lead-ins Remove introductory words phrases that add no meaning to the message.	**Wordy:** I am writing to inform you that parking lot C will be closed on Monday. Revised: ~~I am writing to inform you that~~ parking lot C will be closed on Monday **Concise:** Parking lot C will be closed on Monday.
Eliminate redundancies Eliminate words or phrases that mean the same thing.	**Wordy:** As consumers learn more about ingredients and become more knowledgeable, they demand fresher foods. Revised: As consumers learn more about ingredients ~~and become more knowledgeable~~, they demand fresher foods. **Concise**: As consumers learn more about ingredients, they demand fresher foods.
Eliminate empty words Empty words that act as fillers in a sentence.	**Wordy:** Because of the degree of support from upper management, the plan worked. Revised: Because of ~~the degree of~~ support from upper management, the plan worked. **Concise:** Because of support from upper management, the plan worked.
Avoid noun conversions Use strong instructive verbs	**Wordy:** The company undertook a revision of its earnings forecast. Revised: The company ~~undertook a revision of~~ its earnings forecast. Concise: The company revised its earnings forecast.
Use specific Nouns Use a specific noun is always better than a vague pronoun	Wordy: There are three bids that the board is considering. Revised: ~~There are~~ three bids ~~that~~ the board is considering Concise: The board is considering three bids.

Figure 5.3.4: A demonstration of five concise writing strategies. (Business Communications, 2019; Business Communication Essentials, 2016).

Writing wordy messages in the drafting stage is acceptable, but such messages must be edited later. When editing, a writer must understand how much information readers need. Ensuring the message is concise yet complete is the objective of a good writer.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=96#h5p-33

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 unit 11, outlining structures in unit 12, and paragraph organization all help to achieve a sense of coherence. The pronouns and transitions you use 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.

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. 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 editing during the drafting stage will have been a waste of time.

5. Courteous language

No matter what type of document or the expected audience reaction, courteous writing communicates respect for the reader and 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 reader will be receptive to the information. 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 encourage cooperation and avoid negative, critical, pushy, and demanding words and phrases. 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. 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. Courteous writing is constructive communication that provides instructions on how to move forward. Figure 13.6 presents a few strategies to ensure your writing is courteous.

Figure 5.3.5: A presentation of two strategies to achieve courteous writing. (Business Communications, 2019)

6. Convincing and Confident

Confident writing is highly convincing to readers. Writing that uses decisive language and avoids wishy-washy language like: almost, approximately, basically, might, probably, somewhat, seems and many others, will encourage your audience to accept your decision and opinions rather than question them. Being overconfident can also have consequences. Overconfidence can affect the writer's credibility and turn readers off. To ensure your writing strikes the appropriate balance apply the following strategies.

Strategy	Example
Use strong verbs, precise nouns, and vivid adjectives.	× I took a few classes in risk management while trying to complete the requirements of my MBA. ✓ While completing my MBA, I took two classes in risk management.
Don't make unnecessary apologies.	× Sorry to ask, but could you to confirm the time and location of our next meeting. ✓ Please confirm the time and location of our next meeting.
Use strong assertive phrases.	× I believe the company will install a software updates on the computer system. ✓ The company will install a software updates on its computer system.
Be knowledgeable and informative	× The report seems to suggest that we might be losing money. ✓ The report states profits decreased by 25% during the first quarter of the year.

Figure 5.3.6: An overview of the strategies to achieve confident writing. (Business Commuications, 2019; Business Communication Essentials, 2016)

While some of the strategies in Figure 13.6 seem subtle, the overall effect is clear, authoritative, and direct writing. These qualities increase the confidence the receiver has in your message.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=96#h5p-34

Key Takeaways

Drafting involves writing consistently in a formal, casual/conversational, 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 this unit. 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 long-winded, 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.
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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5.4 EFFECTIVE DOCUMENT DESIGN

Learning Objectives

After studying this unit, you will be able to

- apply the principles of reader-friendly document design to various written formats

INTRODUCTION

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.

Before beginning our in-depth discussion on individual elements of good document design, let's view the video below, *Designing Documents,* for an overview of design principles aimed at creating effective business documents.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=104#h5p-35

DESIGN ELEMENT

The following design elements will be addressed below: **Titles, Headings and Subheadings, Font, Line Spacing, Lists, Visual Aids, Interactive Elements, Balancing Text and Whitespace, Making Accessible, AODA-compliant Documents**

Titles

Almost every business document that exists as a standalone unit must have a title that accurately represents its contents. It's the first thing a reader looks for to understand what the 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 reports. Even emails and memos have titles in the form of subject lines. In whatever document you find it, the following characteristics make titles essential to your reader's understanding of the whole:

- **Topic summary:** A title is the most concise summary possible of a topic. 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. Most professional documents use only the number of words required to give a sense of the topic.
- **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.

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.

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. 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.

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 text below on AODA compliance).

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: Writers considering typeface must choose between two major style categories depending on how they would like to accommodate their readers. **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 helps 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[1].

2. **Font Size:** Size is another important consideration because readers depend on the text being

1. CBC. (2012, July 4). Higgs boson researchers mocked for using Comic Sans font. CBC News. Retrieved http://www.cbc.ca/newsblogs/yourcommunity/2012/07/do-you-use-the-comic-sans-font.html

an ideal size for readability and are frustrated by font sizes that are too big or small. In a standard written document, for instance, a 12-point Arial or Times New Roman is the recommended size by the Accessibility for Ontarians with Disabilities Act (AODA). Increasing the size much past 12-point makes your document appear to be targeting an audience of children. Of course, font size is sometimes increased for titles and any time readers are required to read at a distance, such as posters on a notice board or presentation slides.

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 onto one page, however, would undermine the document's purpose and will frustrate the reader. 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. Likewise, colouring the title of other documents is effective if there are no expectations of doing otherwise (some company-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 text 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.

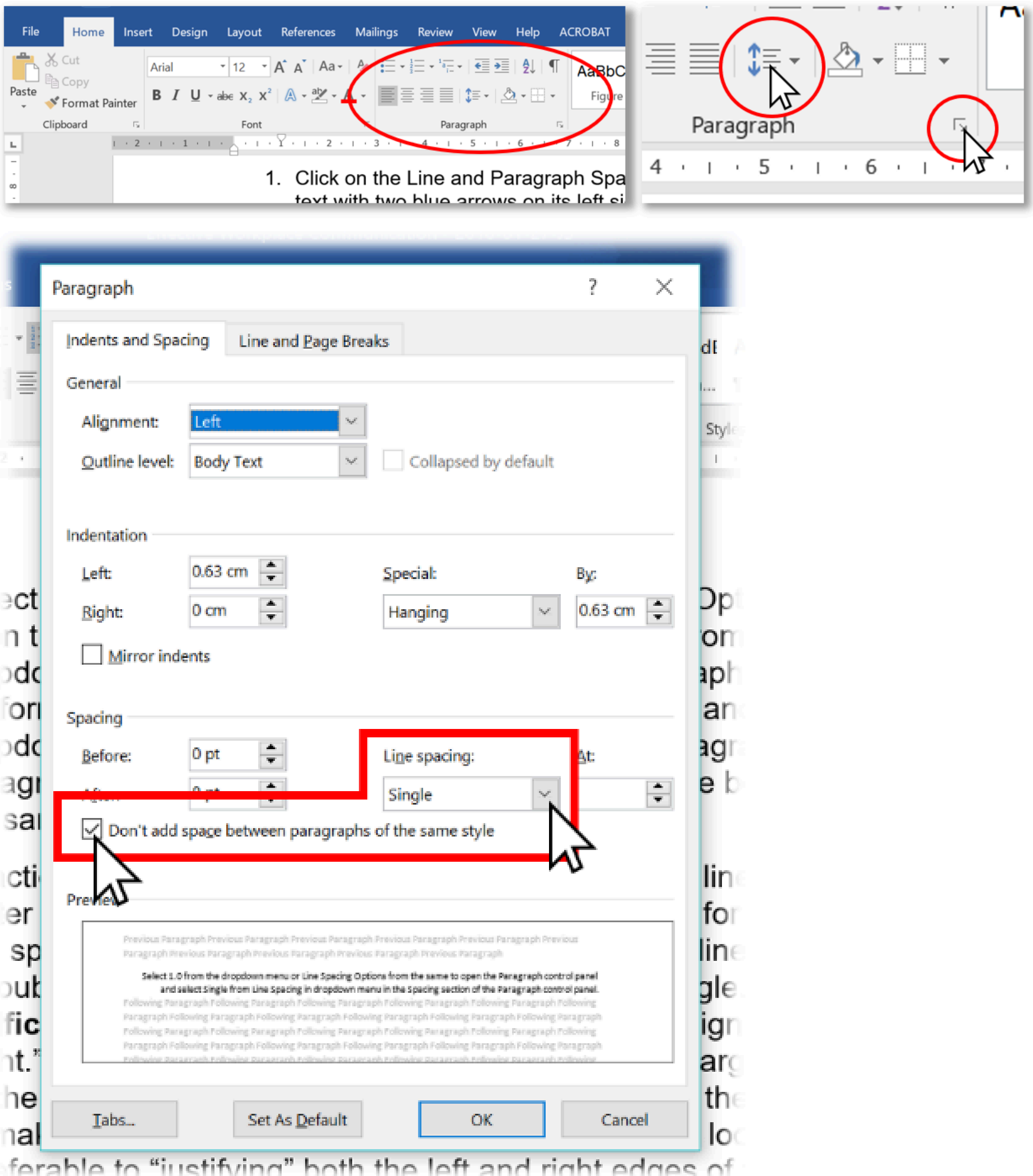
4. Boldface, Italics, and Underlining: Boldface, *italics*, and <u>underlining</u> serve various purposes in focusing audience attention on certain words. Boldface type is especially helpful in directing the audience's eyes towards titles, headings, and keywords as you can see at the beginning of this 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.

Line Spacing

Single-spaced lines are common to most business 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).



2. Figure 14.1: Where to click to get line-spacing options in the MS Word tool ribbon (above)

and Paragraph control panel (right)

3. 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.
4. 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. 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.

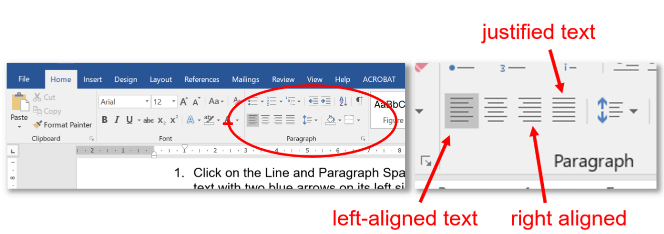


Figure 14.2: Where to click to select text justification or left-aligned ("ragged right") text in the MS Word Home menu tool ribbon

Lists

Another technique that helps the reader skim and easily find sought-after content is using **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 Bulleted Lists for:	Use Numbered Lists for :
• Items on a list that have no specific order. What information is presented first or second is not important. • Points on a presentation slide (e.g., PowerPoint) for easier readability	• Step-by-step procedure or when order is important 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:

- An introductory phrase or sentence that provides context for the information on the list. **The** introductory sentence or phrase should end with a colon 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
- **A period** at the end of each point that is a complete sentence on its own, whether it be in the declarative, imperative, or any other mood. A list of nouns or noun phrases, on the other hand, does not
- 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; 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 above, as a step-by-step procedure, is a sequence of imperative sentences (i.e., each begins with a verb: "Click," "Select," "Perform").

Lists are formatted in two ways: horizontally (as part of a sentence) or vertically (with the use of bullets or numbers). Use the following exercise to practice writing parallel sentences and creating lists.

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, so do 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.

- **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, 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.

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 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.

Balancing Text and Whitespace

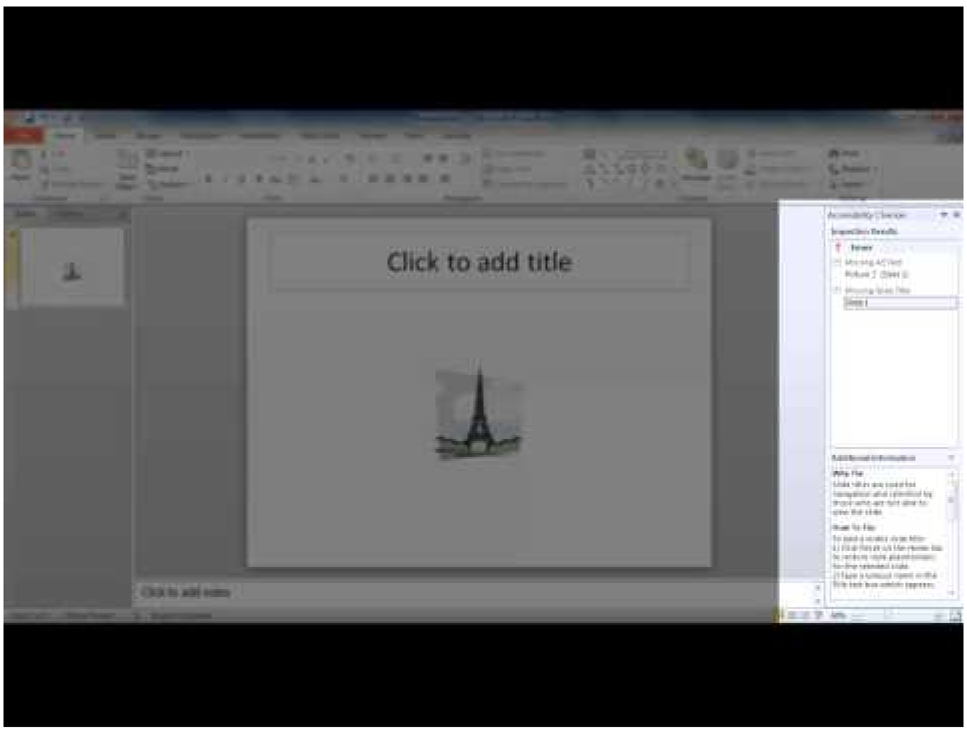
Another consideration that helps a reader find their way around a page is the balance of text and whitespace, which is simply a gap unoccupied by text or graphic elements. The enemy of readability is a wall of text that squeezes out any whitespace, whereas a well-designed document uses whitespace to usher the reader's eyes towards units of text. 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.

Figure 14.3 Use white space strategically to increase document readability. (TheGCBlogg, 2018).

Making Accessible Documents

The Nova Scotia Accessibility Act sets out guidelines for how workplaces can help people with disabilities, including accommodations that extend to document design. Many of the recommendations covered in this unit, such as font size and colour, are justified as accommodations to people with even mild visual impairment. Someone with colour blindness, for instance, maybe 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. 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 an 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 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 on [NSCC's Digital Accessibility Tool Kit](#) for more on how to make your documents compliant.



A YouTube element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=104

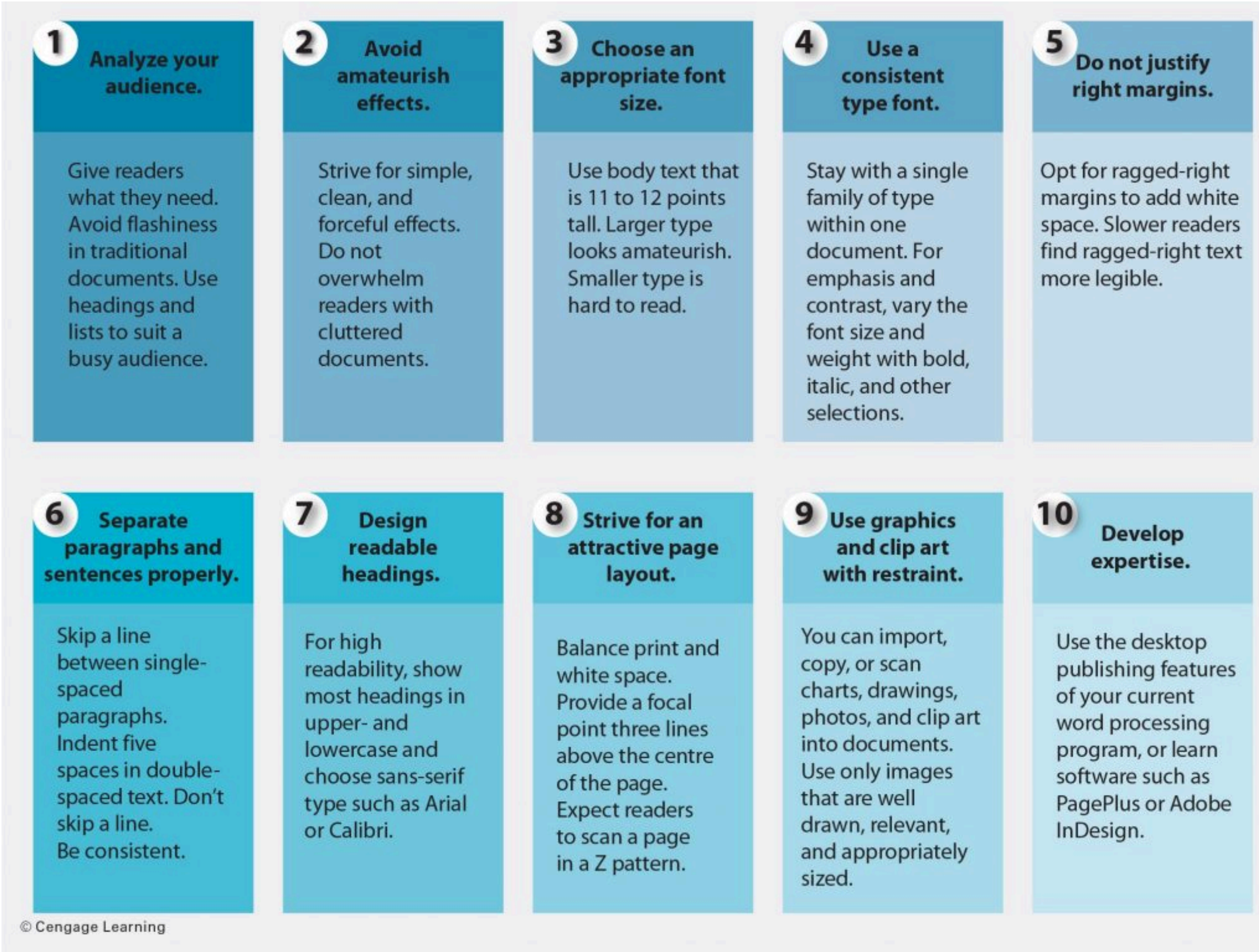


Figure 5.4.4 A summary of the top 10 design principles to create impressive business documents. (Business Communication, 2019).

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 (see summary below).

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 this unit and fix the issues identified.

3. Produce a dummy document that follows guidelines in each of the subsections outlined 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, with 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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5.5 SENTENCES AND PARAGRAPHS

Learning Objectives

After studying this unit, you will be able to

- understand different sentence types
- develop direct and indirect paragraphs
- construct active and passive sentences

INTRODUCTION

Showing your writing abilities involves understanding how to structure sentences and paragraphs. structure. Clear, error-free and context-specific sentences create well-developed paragraphs and improve the likelihood of clear with an audience. Understanding different types of sentences and paragraph structures will make you an effective communicator in business.

TYPES OF SENTENCES

Determining how to arrange your words to communicate a clear and coherent idea takes skill. The key to developing this skill is to understand how to construct the four types of sentences: **simple, compound, complex, and compound-complex**. Each type of sentence has its own distinctive quality and purpose. Table 5.5.1 explains each type of sentence and their structure.

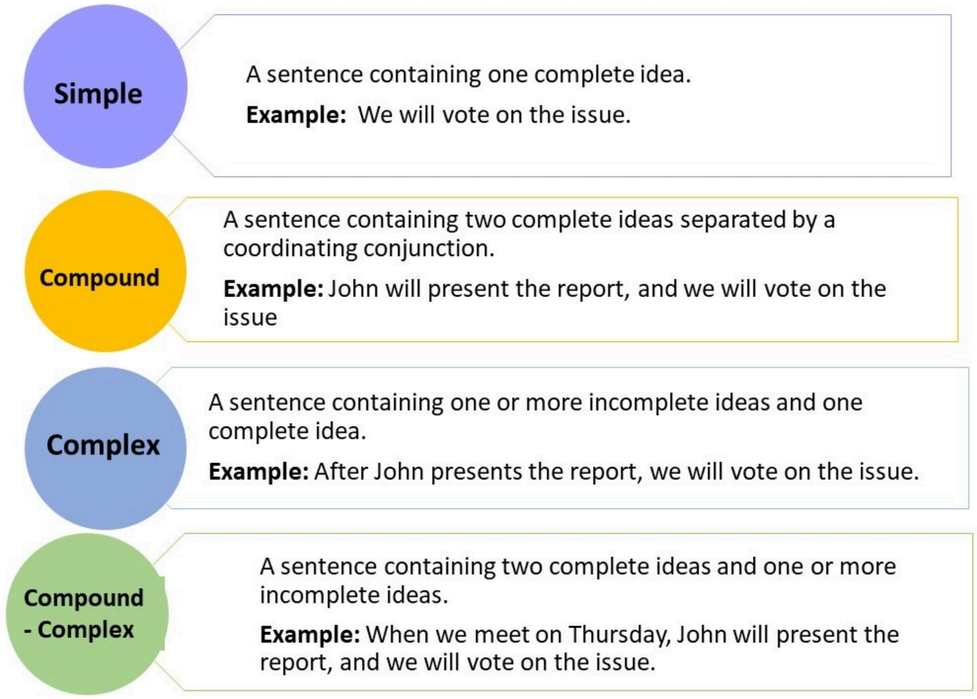

Figure 5.5.1 These four types of sentences are the building block of business writing (Business Communication, 2019).

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Tone

Your writing is an expression of you and involves how you choose and use your words to develop ideas and build paragraphs. These factors will communicate a certain tone to your writing or a reader's perception of the message: friendly, helpful, angry, demanding, or combative. At all times, you want to ensure you communicate goodwill and a helpful tone to your reader. Choosing to write in the active or passive voice and using courteous and polite language will help you communicate the right tone in your writing.

Writing Skill 5.5.1 – Active and Passive Language: When a sentence is structured so the subject of the sentence is the doer of the action, you are using the **active voice**. The active voice produces short, direct, easy-to-read sentences that communicate good/neutral information by emphasizing the doer of the action (the "you" view). For these reasons, most of your business writing will be done using the active voice.

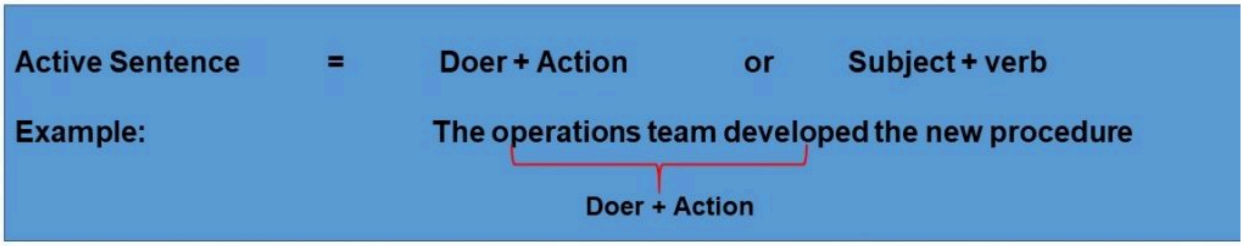

Figure 5.5.2 The subject and verb of a sentence are always side by side in an active sentence.

On the other hand, when the subject in a sentence is receiving the action, you are using the **passive voice.** The passive voice produces indirect, formal, vague, and longer sentences. In business communications, the passive voice is used in very specific situations:

- To de-emphasize bad news or a mistake
- To show tact and allow diplomacy
- To de-emphasize the doer of the action

Although, the active voice is used most often in business, sometimes the passive voice is a better strategy to communicate your message. When an error has been made or negative news must be delivered, using the active voice will make your writing sound accusatory or unsympathetic. Review Figure 5.5.3 for examples of when using the passive voice creates a better tone in your writing.

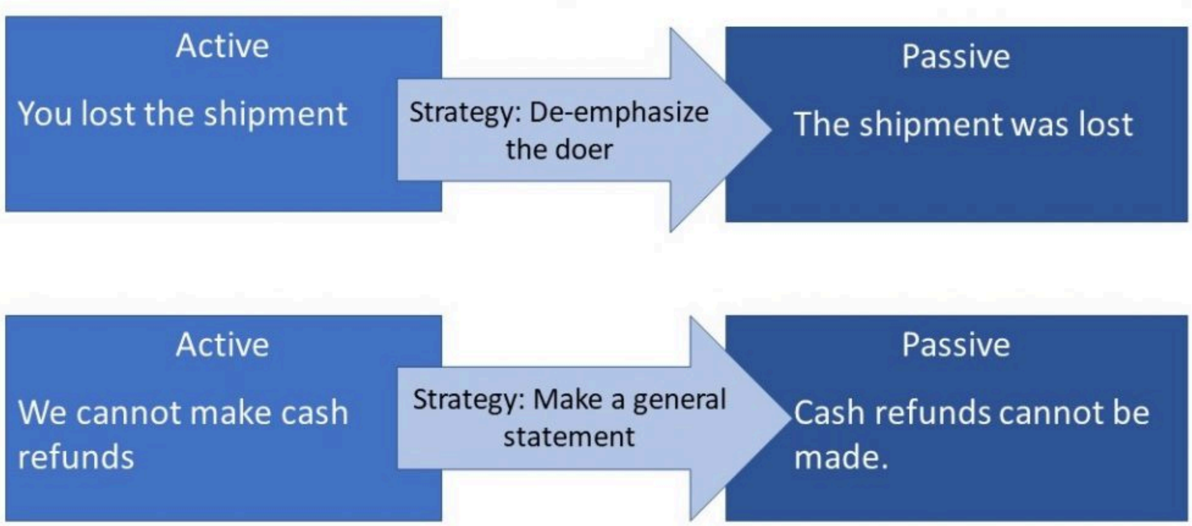

Figure 5.5.3 The passive creates a better tone in specific situations (Business Communication, 2019).

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Writing Skill 5.5.2 – Positive Language: Generally, readers are more receptive to positive or neutral news than negative news. Using positive language will make your message reader-friendly. In addition, positive language conveys more information, is instructive, is **forward looking**, and communicates goodwill. The trick to positive writing is avoiding negative words with negative connotations. Table 5.5.1 provides a list of some negative words and their connotations when included in your writing.

Table 5.5.1 Avoiding Negative Phrases

Negative Words or Phrases	Connotations
You overlooked	(You are careless.)
You failed to	(You are careless.)
You state that	(But I don't believe you.)
You claim that	(It's probably untrue.)
You are wrong	(I am right.)

When writing, be careful that your language does not communicate unintended negative messages (Business Communication, 2019).

To ensure your writing is positive:

- Provide instructions on how to accomplish a task.
- Tell the reader what is possible.

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Effective writers pay attention to the construction of sentences. Careful and thoughtful use of words and phrases can be challenging. Thus, continually working on this area of business writing will improve your ability to create well-crafted messages for your audience.

THE PARAGRAPH

Paragraphs are the building block of all business documents. Paragraphs will vary in length and form, but all paragraphs have three essential components: **unity, organization, and coherence**. It doesn't matter if you were taught the **PEEL**, **TEEL,** or hamburger method of paragraph development, knowing how to arrange the elements of a paragraph will help you clearly communicate your message to the receiver.

Unity

The first sentence in a paragraph is the **topic sentence** which introduces the subject or general idea that will be developed in the paragraph. **Supporting sentences** that support, expand, and clarify the topic such as examples, illustrations, and facts and statistics gives the paragraph its unity.

Organization

What information comes first, the topic sentence or the supporting sentence will depend on if the paragraph the **direct** or **indirect** approach.

Direct Paragraphs: Direct paragraphs start with the main idea (topic sentence) followed by the supporting sentences (explanation). As was discussed earlier, most business writing follows the direct plan. Routine information, good news, or non-sensitive messages use the direct approach as readers want to immediately understand the main reason for the communication.

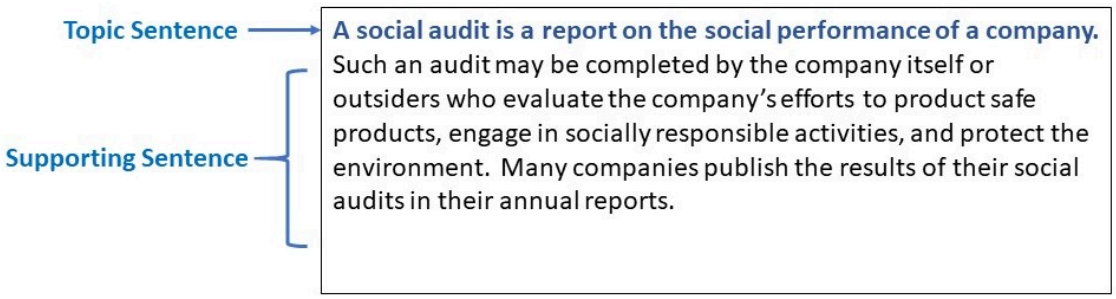

Figure 5.5.4 Direct organization means paragraphs begin with the topic sentence (Business Communications, 2019)

Indirect Paragraphs: Indirect paragraphs use the opposite organizing pattern. These paragraphs begin with the supporting sentence to provide an explanation, clarification, or justification before providing the Main idea (topic sentence). The indirect pattern is used to deliver bad news, sensitive information, or to persuade the reader. This organizing pattern allows the writer to explain or justify the main point of the message presented in the topic sentence so the reader is more likely to accept the message.

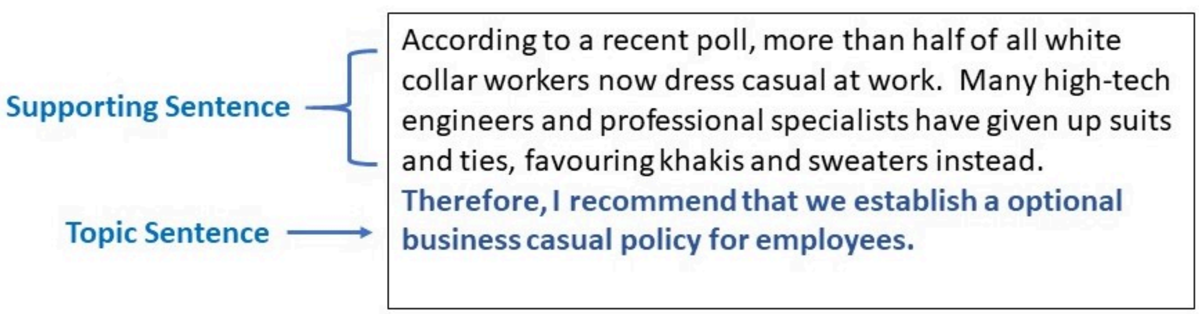

Figure 5.5.5 Indirect organization involves presenting the supporting sentences before the topic sentence (Business Communication, 2019).

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Coherence

Coherence refers to the way ideas in a paragraph are connected and linked together. The ideas in well-written paragraphs are logically connected and lead the reader smoothly throughout the paragraph. When paragraphs are coherent, a group of sentences in a sequence will "make sense" and readers will understand how the sentences work together to communicate the complete message. When paragraphs are incoherent, sentences lack flow and not logically fit together. To ensure your paragraphs are coherent, use one or a combination of the following techniques.

Dovetailing: When the topic that ends one sentence, begins the next. Dovetailing helps to connect sentences by repeating keywords. A reader will recognize the connection by the repeated keywords.

Pronouns: Combine pronouns with a noun to which each refers. Using pronouns in this way helps to build continuity between sentences while cutting down on repetition. When using pronouns without the helping noun, ensure that pronoun reference is clear.

Transitional Devices: Transitional words and expressions act as two-way indicators of what has been said and what is going to be said. Furthermore, therefore, consequently, and however are all examples of transitional words. Because there are so many transitional words and expressions, understanding what each means and which word or expression is correct for a specific sentence takes practice. Using the wrong word or expression can change the meaning of a sentence and cause miscommunication. Transitional devices can be used to

- Add an idea
- Show contrast or comparison
- Provide an example or illustration
- Summarize or conclude a thought
- Demonstrate chronology
- Show cause or effect

Table 5.5.2 shows how to use dovetailing, pronouns, and transitional devices to achieve coherence.

Table 15.2 Building Coherence

Technique	Example
Dovetailing	The company offers an outstanding **flexible payment plan. The plan** permits deferred payments for up to two years.
Pronouns	All new park **employees** receive a two week orientation. **They** learn that every staffer has a vital role in preparing for the show.
Transitional Devices	The computer enables employees to write documents quickly; **consequently,** all modern workplaces have computers.

A demonstration of the three techniques used to create coherence in a paragraph (Communicating for Results, 2017).

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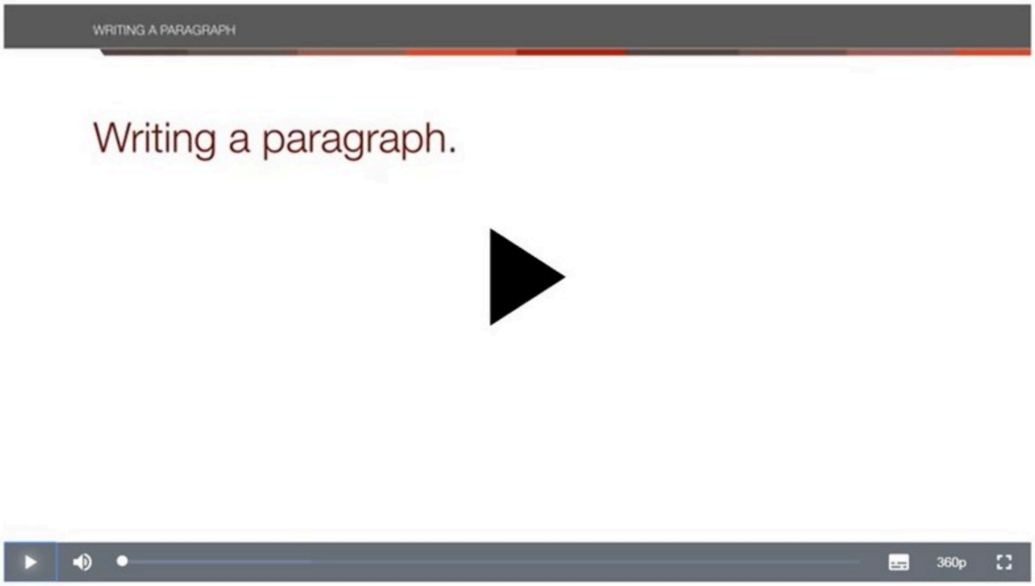
No that we've gone through the parts, qualities, and characteristics of an effective business paragraph, view the video below for a demonstration of how to put these components together.



Click on the image above to view the video Writing a Paragraph (Corsera, 2020).

Key Takeaways

- Understanding the four types of sentences is important to developing well-crafted paragraphs.
- use active, passive, and positive language to create a reader-friendly tone in your writing
- Paragraphs have three important components: unity, organization, and coherence.

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CHAPTER 6: ROUTINE CORRESPONDENCE

The vast majority of the couple hundred billion business emails sent every day 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.

6.1 INFORMATION SHARES, ACTION REQUESTS, AND REPLIES

Learning Objectives

After reading this unit, you will be able to

- understand the difference between different types of routine messages
- understand how to components of different types of routine message messages

INTRODUCTION

Ask any professional what kinds of messages they spend the majority of their time at a computer writing and responding to. They will likely tell you that they're writing an email, memo or letter **requesting information or action and replying** to those with answers or acknowledgments. To write these types of documents you may need to polish your style, grammar 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. Before looking specifically at each document type, let's take a minute to watch a video introduction to routine business correspondence.

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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 Figure 6.1.1 below.

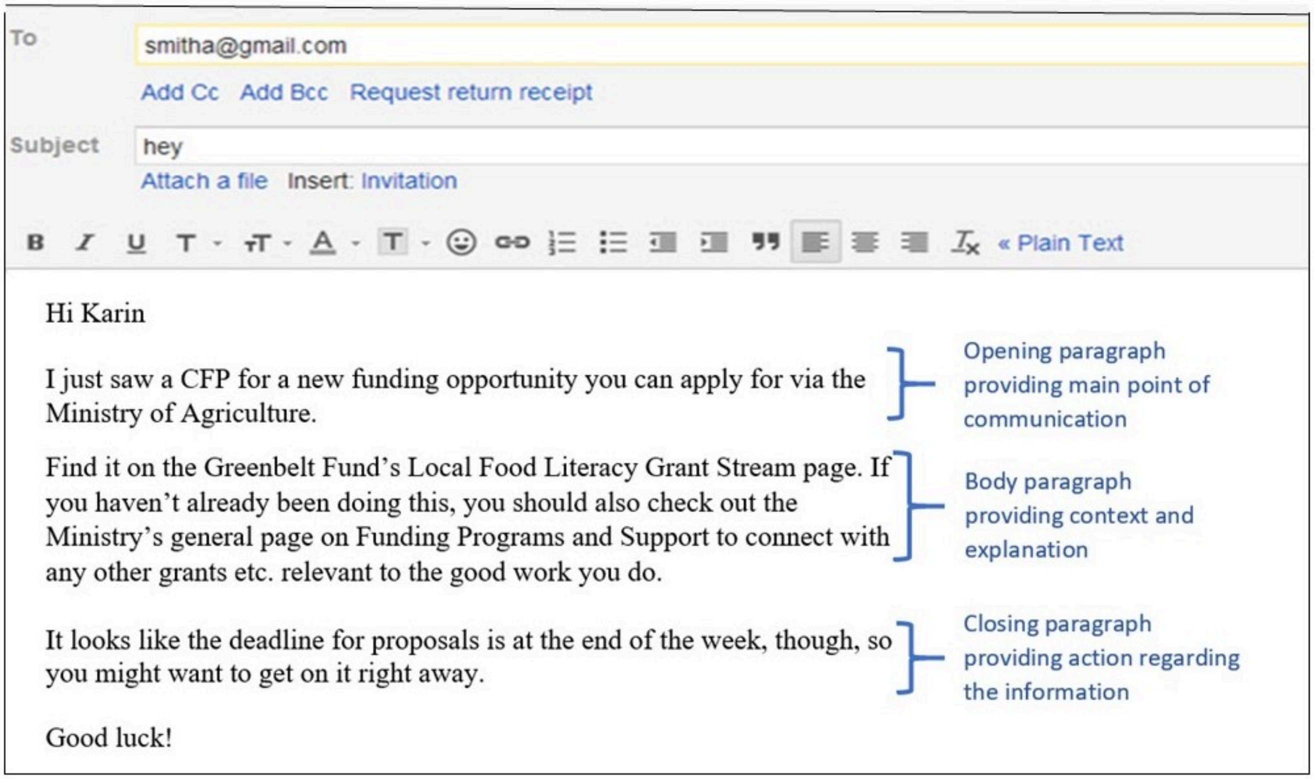

Figure 6.1.1: The basic format for a routine message with an opening, body, and closing.

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 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. Information shares to a large group, such as a departmental memo to 60 employees, don't usually require acknowledgment and would be slightly more formal in tone. 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.

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 — and proceeding with background and more detailed instruction if necessary as we see in Figure 6.1.2 below.

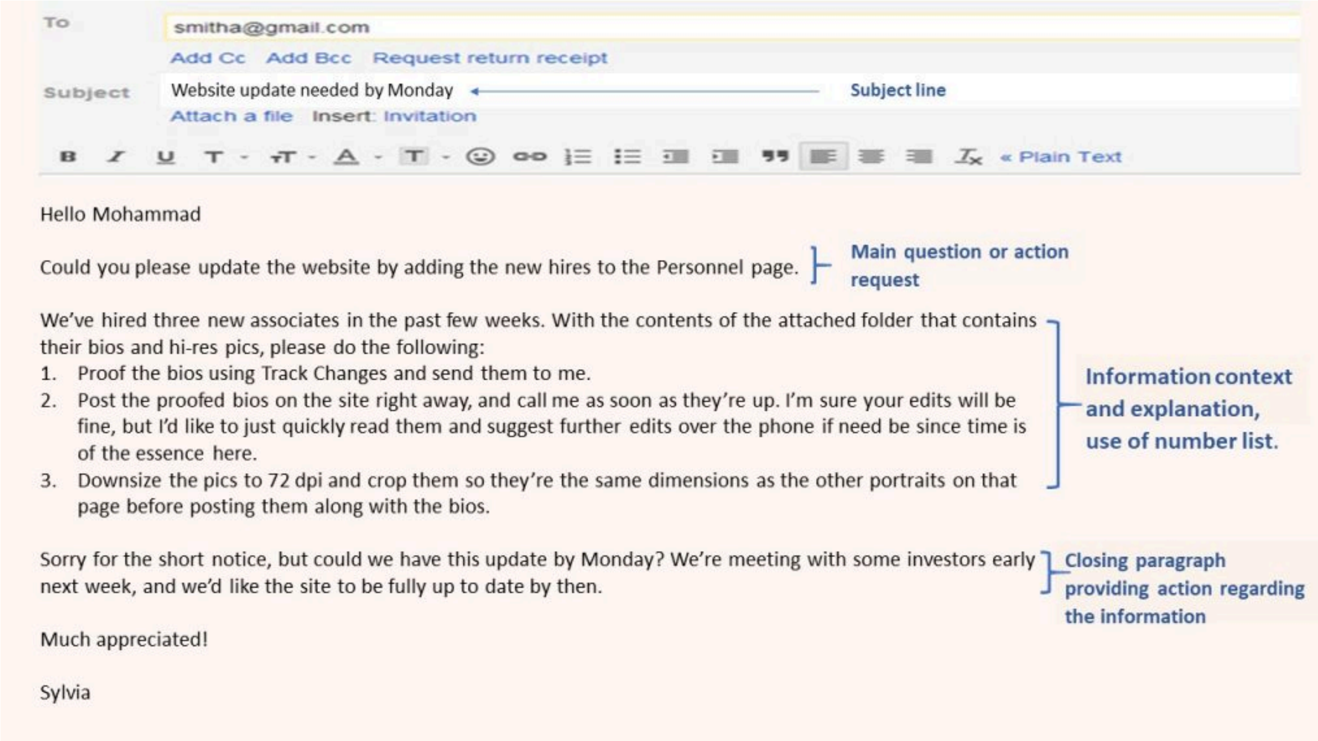

Figure 6.1.2: The format and structure for a request letter.

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. Never forget, however, the importance of saying "please" when asking someone to do something (see unit 13 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 unit 14). 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.

INSTRUCTIONAL MESSAGES

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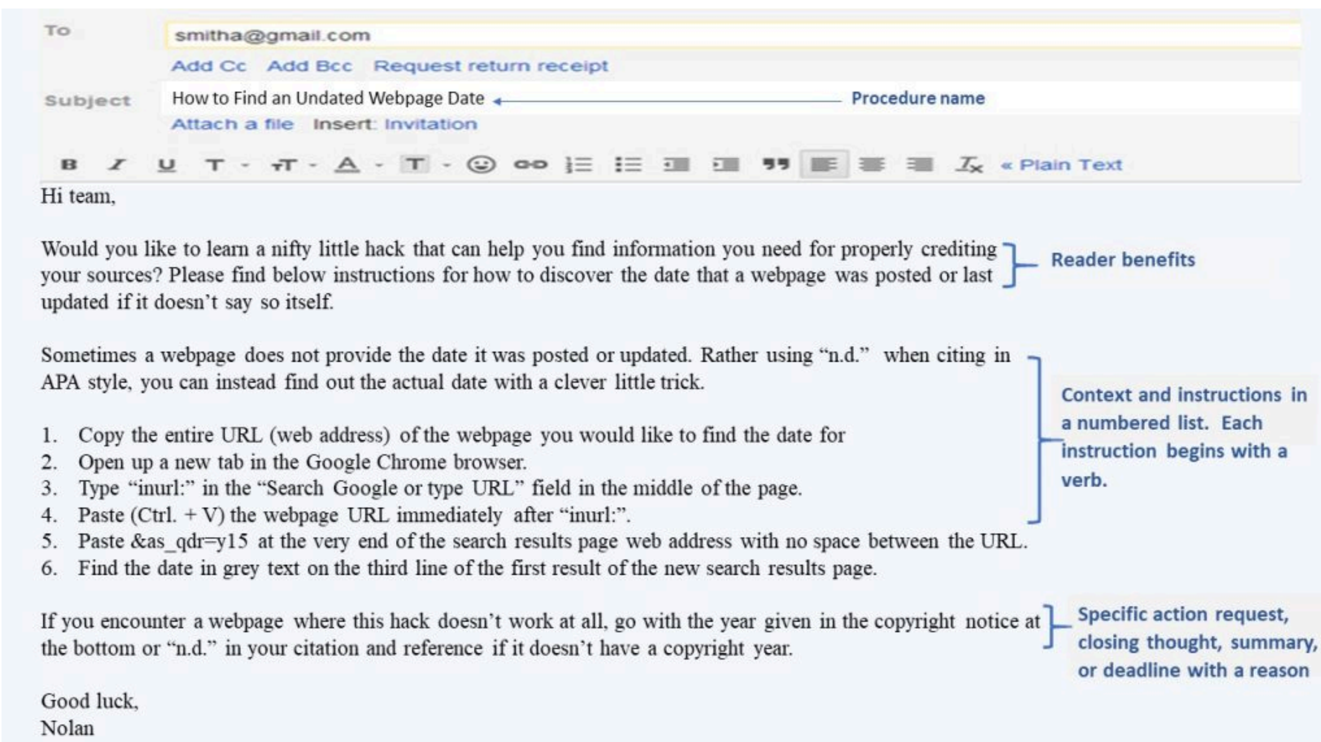
Effective organization and style are critical in requests for action that contain detailed instructions. Whether you're explaining how to operate equipment, apply for funding, renew a membership, or submit a payment, the recipient's success depends on the quality of the instruction. Vagueness and a lack 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 unit 5 on analyzing your audience) to providing the appropriate level of detail for the desired results.

Look at any procedures document 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. In Table 6.1.3 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.

Figure 6.1.3: A simple or more complex numbered list is the most effective manner to provide instructions.

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 Figure 6.1.4 below.


To smitha@gmail.com

Add Cc Add Bcc Request return receipt

Subject How to Find an Undated Webpage Date

Attach a file Insert: Invitation

« Plain Text

Hi team,

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.

Sometimes a webpage does not provide the date it was posted or updated. Rather using "n.d." when citing in APA style, you can instead find out the actual date with a clever little trick.

1. Copy the entire URL (web address) of the webpage you would like to find the date for
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 (Ctrl. + V) the webpage URL immediately after "inurl:".
5. Paste &as_qdr=y15 at the very end of the search results page web address with no space between the URL.
6. Find the date in grey text on the third line of the first result of the new search results page.

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 have a copyright year.

Good luck,
Nolan

Figure 6.1.4: A request with instructions. Note that the instructions are provided using a number list and a verb to begin each instruction.

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". You can certainly follow up with helpful *DON'Ts* and consequences if necessary, but phrased in courteous language, such as "please remember to exercise caution in construction areas."

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INDIRECT INFORMATION OR ACTION REQUESTS

If you expect resistance to your request, an indirect approach is more effective (see unit 11 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 unit 27 on persuasive messages). When it's important to have present your argument in writing, however, such requests should be clear and easy to spot, but **buffered** by goodwill statements and reasonable justifications, as shown in Figure 6.1.5 below.

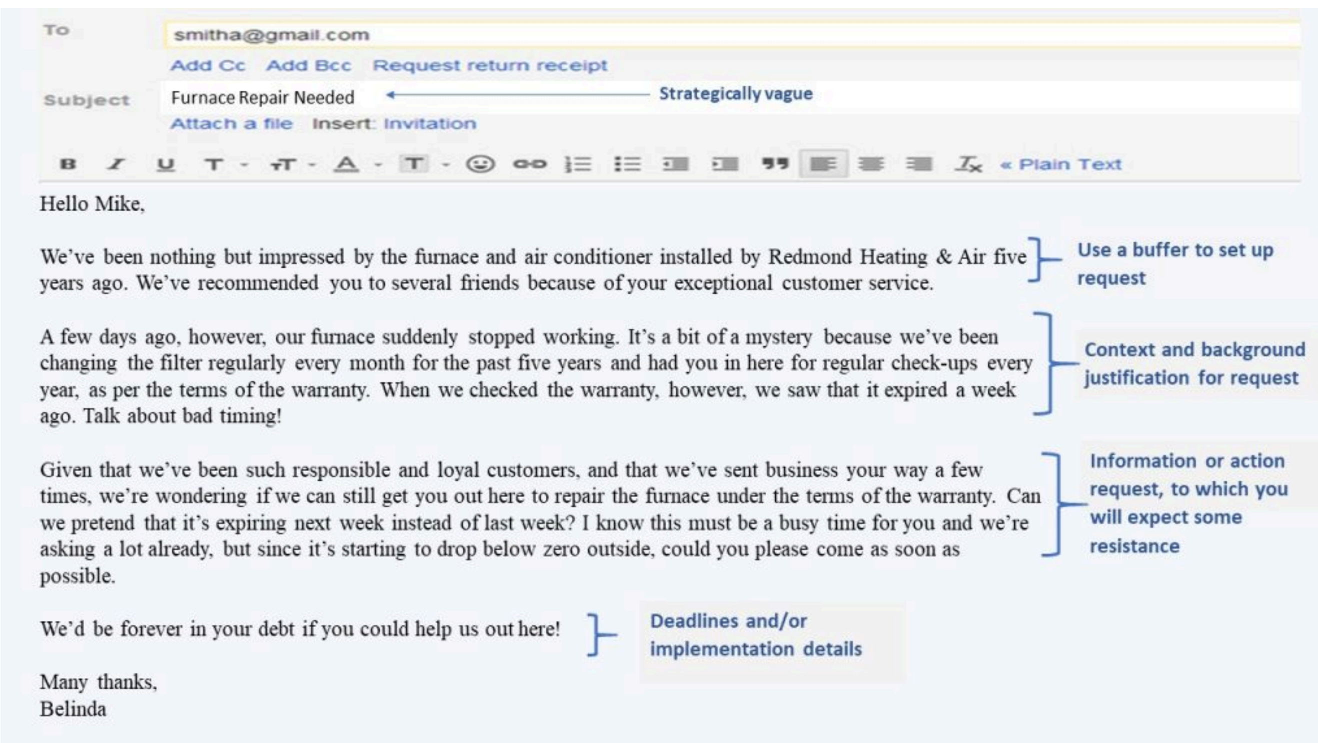

Figure 6.1.5: Use the indirect approach to write requests the receiver may not be happy about.

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 unit 26 on negative messages). Stylistically, such responses should follow the 6 Cs of effective business style (see unit 13), especially courtesies such as prioritizing the "you" view (unit 13), audience benefits (unit 13), and saying "please" for follow-up action requests (unit 13). 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 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 Figure 6.1.6 below.

Company logo
Company Address

Date

Inside Address
City, Province
Postal Code

Re: Accommodation and conference rooms for 250 guests

Mr. Prendergast:

Thank you so much for choosing the Vancouver Marriott for your spring 2020 sales conference. We would be pleased to accommodate 250 guests and set aside four conference rooms next May 25 through 29.

Main information or action confirmation

In answer to your other questions:

- 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.

Used direct organization to provides requested information

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.

Follow-up action

Sincerely,

Rufus Killarney, Booking Manager

Figure 6.1.6: Use the direct approach for requests the receivers are likely to cooperate with.

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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 6.1.3. It must be a procedure with at least five steps and is familiar to you but unfamiliar to them. Can they follow your procedure and get the results you desire?

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6.2 COMPLAINTS AND CLAIMS

Learning Objectives

After reading this unit, you will be able to

- understand the difference between complaints and claims, and
- write complaints and claims correspondence

INTRODUCTION

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As the video above suggests, 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, customers or clients are likely to make your company aware of what went wrong and what they want to be 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.

When customers are reasonable about communicating a problem with a situation or business transaction, the customer service representative (CSR) or manager dealing with the matter is more likely to respond positively and meet the need of the client. However, 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 CSR or manager 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 receiver of a complaint message 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 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%[1]. 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 seriously damage 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.

> **One negative review can cost a business 22% of customers and three negative reviews 59%**
>
> (Arevalo, 2017)

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 strikes the right tone, they can end up getting more than they originally bargained for.

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WRITING A COMPLAINT OR CLAIM MESSAGE ORGANIZATION

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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:

1. Arevalo, M. (2017, March 15). The impact of online reviews on businesses. BrightLocal. Retrieved from https://www.brightlocal.com/2017/03/15/the-impact-of-online-reviews/

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 complementing the recipient's company, however, you increase 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 6.2.1: 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.

THE ADJUSTMENT LETTER

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.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=168#h5p-66

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. If you're going to grant the claim, write it whole-heartedly 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. An apology might also be appropriate in the message body.

Table 6.2.2: 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	Hello, Samantha: 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.
2. Body	Details of compliance and/or assurances of improved process	To receive your refund and gift card, please return to our Belleville location with your receipt and the credit card that was charged, so that we can credit the same card $90. (For consumer protection reasons, we are unable to complete any transactions without the card.) 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.
3. Closing	Courteous statements expressing confidence in future business relations	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. Have a great day! Melissa

Of course, not all complaints or claims deserve an adjustment, so we will examine how to write refusals effectively.

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:

Figure 6.2.1: Include these steps to compose an effective apology for company error (Communicating for Results).

- **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.
- **Specific:** To be sincere, an apology must refer to a specific error by briefly describing it, possibly including dates, locations, 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[2].

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, 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.

2. Dangerfield, K. (2018, June 11). Starbucks across Canada closing early Monday for anti-bias training: Here's what to know. Global News. Retrieved from https://globalnews.ca/news/4266192/starbucks-canada-close-monday-bias-training/

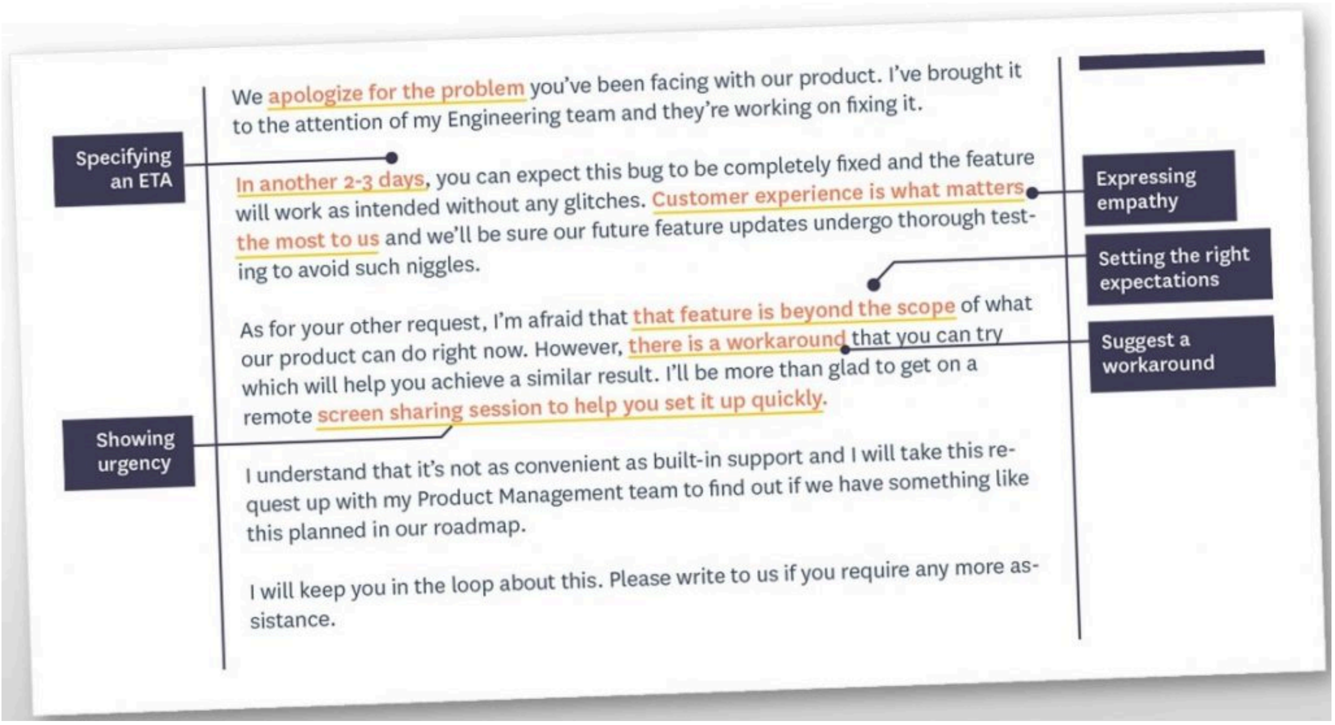

Figure 6.2.2: An example of how to integrate the steps in Figure 6.2.1 into a written document (Khan, n.d.).

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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 of 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 Table 6.2.2 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 Table 6.2.2 above.

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6.3 NEGATIVE MESSAGES

Learning Objectives

After reading this unit, you will be able to:

- organize and write negative messages
- outline the structure of an indirect-approach bad-news message
- explain the importance of communicating bad news carefully in professional contexts

INTRODUCTION

Just as in life, the workplace isn't always sunny. 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 from a more tactful, indirect approach. Keep in mind the following advice whenever required to deliver unwelcome news.

NEGATIVE MESSAGES TOPICS

The Seven Goals of Bad-news Messages

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The video above provides five strategies for delivering bad news. 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. The list below provides a few more 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.

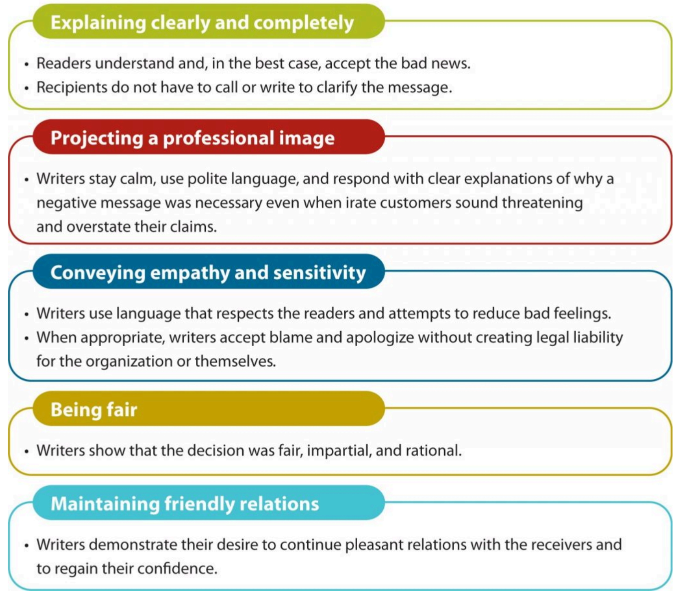

Figure 6.3.1: Follow this process to deliver bad news (Business Communication, 2019).

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. It may turn out that he has to drop his kids off for school at 8 a.m. 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).

ORGANIZING AN INDIRECT BAD-NEWS MESSAGE

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. If you tactlessly provide your audience 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:

Figure 6.3.2: Determining when to use an indirect pattern is dependent on the communication situation (Business Communication, 2019).

1. Buffer
2. Justification
3. Bad news + redirection
4. Positive action closing

This is much like the three-part structure we've seen before, only the body is now divided into two distinct parts where the order really matters. An explanation of each part of an indirect negative newsletter follows.

BAD-NEWS MESSAGE BUFFER

Begin with neutral or positive statements that set a goodwill tone and serve as a **buffer** for the information to come. A buffer softens the blow of bad news. 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[1]
- **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.

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 give them the 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.

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https://pressbooks.nscc.ca/nscccommtrades/?p=174#h5p-69

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

1. Guffey, M. E., Loewy, D., Almonte, R. (2016). Essentials of business communication (8th Can. Ed.). Toronto: Nelson. p. 194

agreeable, pro-social, or progressive benefit rather than saying that you're merely trying to maximize company or shareholder profits.

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 "hamburger" organization of constructive criticism sandwiched between statements of praise. 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 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 news of someone getting hired. While the rejected applicant probably won't be pleased 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.

POSITIVE ACTION CLOSING

As we've seen in previous explorations of message organization, 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. See Table 6.3.1 for an example.

Table 6.3.1: 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 11:57 p.m. 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.

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 by following the general principles given below when delivering bad news. The following video is a good example of what not to do when delivering bad news.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=174#h5p-70

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.

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 share 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.

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[2].

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 does not have a high emotional impact:**
    - 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

Figure 6.3.3: Although most bad news will be delivered using an indirect approach, in certain situations, the direct approach is preferable (Business Communications, 2019).

2. (Business Communication for Success, 2015)

news as a policy because it is more time-efficient.

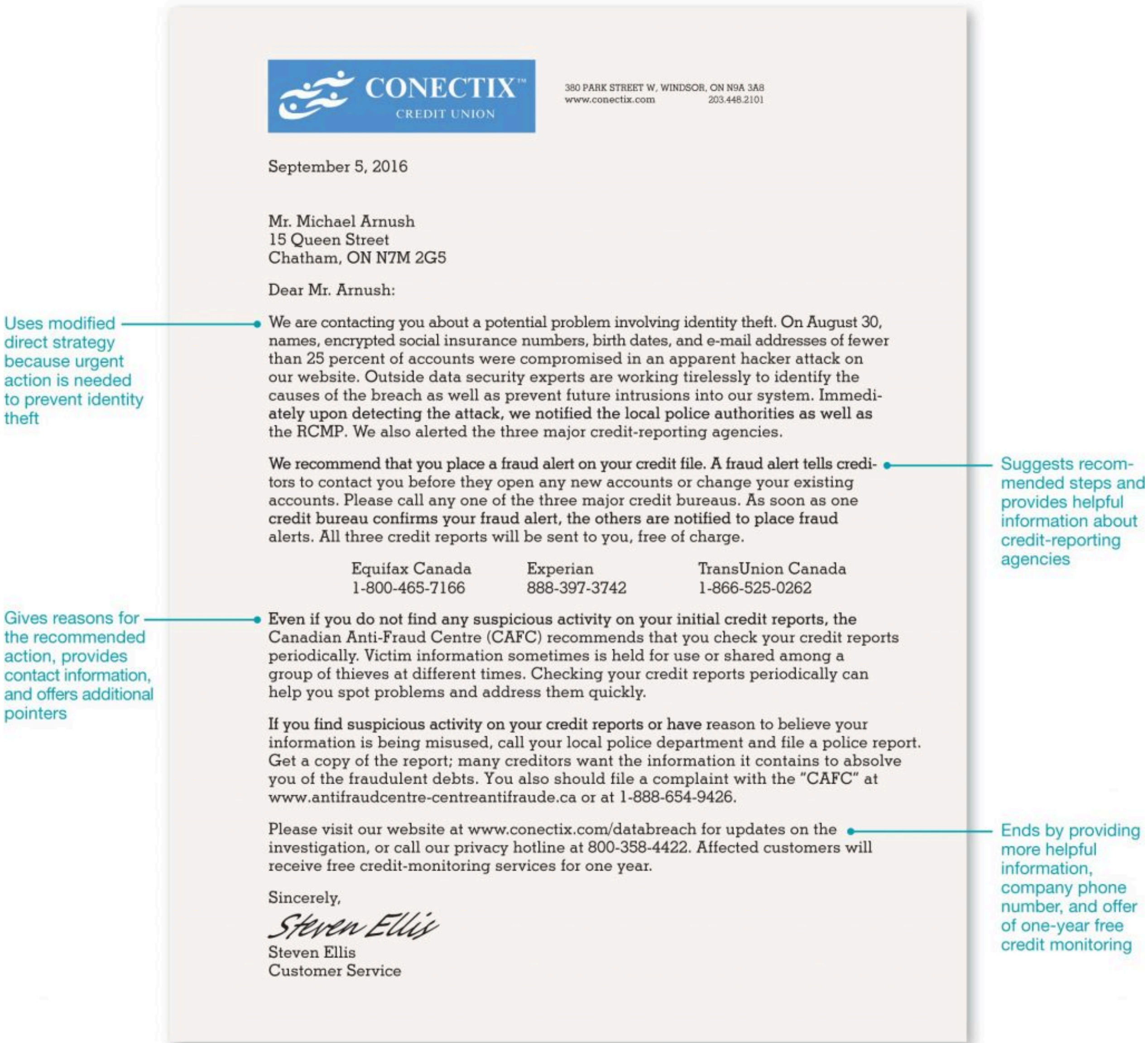
- **When you know that the recipient prefers or requires the direct approach:** Though the indirect approach is intended as a nice way to deliver bad news, some people would rather you be blunt. "Give it to me straight, doc. I'm a grown-up. I can take it," they might say. Since a message must always 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. 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, 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. 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:

1. **Opening:** State the bad news right upfront.
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[3].

3. (Guffey et al., 2016, p. 190)



CONECTIX™ CREDIT UNION

380 PARK STREET W, WINDSOR, ON N9A 3A8
www.conectix.com 203.448.2101

September 5, 2016

Mr. Michael Arnush
15 Queen Street
Chatham, ON N7M 2G5

Dear Mr. Arnush:

We are contacting you about a potential problem involving identity theft. On August 30, names, encrypted social insurance numbers, birth dates, and e-mail addresses of fewer than 25 percent of accounts were compromised in an apparent hacker attack on our website. Outside data security experts are working tirelessly to identify the causes of the breach as well as prevent future intrusions into our system. Immediately upon detecting the attack, we notified the local police authorities as well as the RCMP. We also alerted the three major credit-reporting agencies.

We recommend that you place a fraud alert on your credit file. A fraud alert tells creditors to contact you before they open any new accounts or change your existing accounts. Please call any one of the three major credit bureaus. As soon as one credit bureau confirms your fraud alert, the others are notified to place fraud alerts. All three credit reports will be sent to you, free of charge.

Equifax Canada	Experian	TransUnion Canada
1-800-465-7166	888-397-3742	1-866-525-0262

Even if you do not find any suspicious activity on your initial credit reports, the Canadian Anti-Fraud Centre (CAFC) recommends that you check your credit reports periodically. Victim information sometimes is held for use or shared among a group of thieves at different times. Checking your credit reports periodically can help you spot problems and address them quickly.

If you find suspicious activity on your credit reports or have reason to believe your information is being misused, call your local police department and file a police report. Get a copy of the report; many creditors want the information it contains to absolve you of the fraudulent debts. You also should file a complaint with the "CAFC" at www.antifraudcentre-centreantifraude.ca or at 1-888-654-9426.

Please visit our website at www.conectix.com/databreach for updates on the investigation, or call our privacy hotline at 800-358-4422. Affected customers will receive free credit-monitoring services for one year.

Sincerely,

Steven Ellis

Steven Ellis
Customer Service

Figure 6.3.4: An example of how to apply the direct approach to delivering bad news (Business Communication, 2019).

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=174#h5p-71

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.

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.

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?

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6.4 PERSUASIVE MESSAGES

Learning Objectives

After reading this unit, you will be able to:

- organize and write persuasive messages
- outline the structure of a persuasive message
- explain the importance of persuasion in professional contexts

INTRODUCTION

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 paycheque.

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. With all businesses involved in some sort of persuasion, how do you stand out? The video below explains a few effective persuasive techniques.

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THE RHETORICAL TRIANGLE

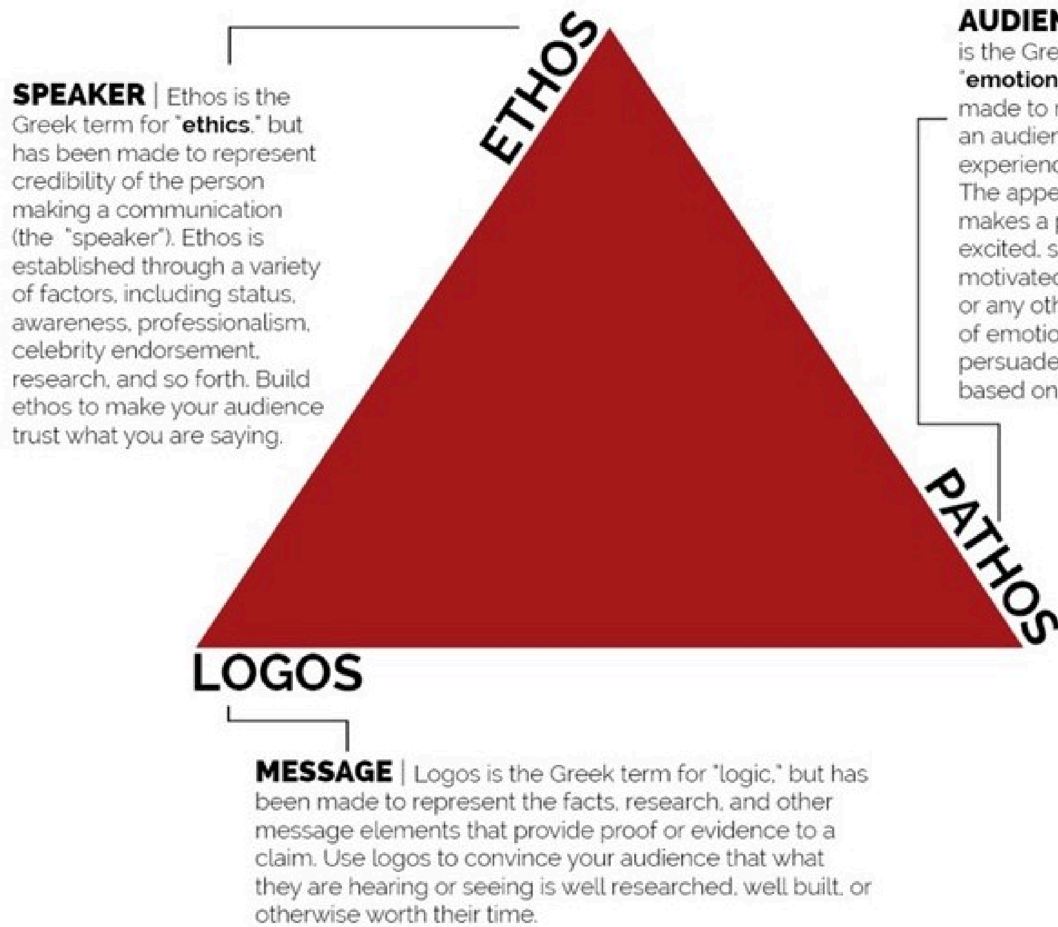

Figure 6.4.1: The Rhetorical Triangle explaining the three methods of persuasion (Visualcommunicationguy, 2020).

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 of 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.[1] These three appeals can also complement other effective techniques in persuading an audience as we shall see throughout this section.

1. (*Business Communication for Success*, 2015).

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https://pressbooks.nscc.ca/nscccommtrades/?p=181#h5p-73

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. The six principles are: **Reciprocity, Scarcity, Authority, Commitment and Consistency, Consensus, and Liking.** Each principle is explained in detail following the video.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=181#h5p-74

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 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.

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 a 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 the chances of swaying the customer from contemplation to action, which is to close the sale.

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, 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.

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.

Figure 6.4.2: The six persuasive principles that influence human behaviour (Business Communication, 2019).

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 of more credible information because it makes decision-making easier in the fight for survival.

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".[2]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=181#h5p-75

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 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":

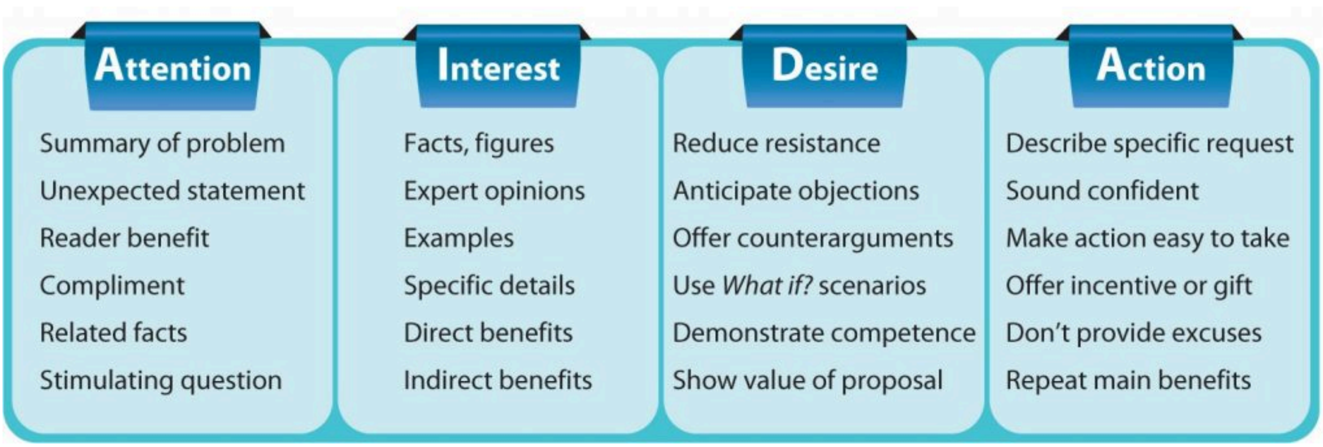

Figure 6.4.3: Each element of the AIDA strategy explained (Business Communication, 2019).

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

2. (*Business Communication for Success*, 2015).

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.

I – INTEREST-BUILDING BACKGROUND

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 background of the message could be "At Synaptic Communications, we will save you time by . . . ." Though you might want to save detailed product descriptions for the next part, some descriptions might be necessary here as you focus on how the product or service will solve the customer's problem.

The 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:

> 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.

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 100 km 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. 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 Health Canada 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 mentioning 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.

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 ($29.99).
- **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 $69.99. 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[3].

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, such as saying that the deal holds only while supplies last or the promo code will expire at the end of the day.

3. Boachie, P. (2016, July 21). 5 strategies of 'psychological pricing.' Entrepreneur. Retrieved from https://www.entrepreneur.com/article/279464

Sales pitches are effective only if they're credible. Even one exaggerated claim can sink the entire message. 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 the topic of avoidable unethical persuasive techniques, but first, let's turn our attention in the next section to a more uplifting type of message.


ARAI

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October 15, 2016

Ms. Susan Riverston
Assistant Vice President
Five Star Finance Consultants
2469 Langton Avenue
Thornhill, ON L3J 3M8

Dear Ms. Riverston:

Has your company ever lost a valued employee to another organization that offered 20 percent more in salary for the same position? Have you ever added a unique job title but had no idea what compensation the position demanded?

To remain competitive in hiring and to retain qualified workers, companies rely on survey data showing current salaries. Anderson Research Associates has been collecting business data for a quarter century and has been honoured by professional associations for its accurate data. We need your help in collecting salary data for today's workers. Information from the enclosed questionnaire will supply companies like yours with such data.

Your information, of course, will be treated confidentially. The questionnaire takes but a few moments to complete, and it can provide substantial dividends for professional organizations that need comparative salary data.

To show our gratitude for your participation, we will send you comprehensive salary surveys for your industry and your metropolitan area. Not only will you find basic salaries, but you will also learn about bonus and incentive plans, special pay differentials, expense reimbursements, perquisites, such as a company car and credit card, and special payments, such as beeper pay.

Comparative salary data are impossible to provide without the support of professionals like you. Please complete the questionnaire and return it in the prepaid envelope before November 1, our fall deadline. You will be better informed about how much your employees earn compared with others in your industry.

Sincerely yours,

Cynde Ferris

Cynde Ferris
Director, Survey Research

Enclosures

Figure 6.4.4: An example of a persuasive letter employing the AIDA writing principles (Business Communication, 2019).

Knowledge Check

Review the following poorly written email and lists five errors. Once you have listed as least five answer, view the answers to check your learning.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=181#h5p-76

A revised version of the email using the AIDA principles is below.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=181#h5p-77

PERSUASION IN THE DIGITAL AGE

Persuasive messages via digital communication is now an established part of business practice. The degree of social media success is measured by the application of the **six persuasion techniques** and the degree to which your message is heard, repeated, and valued. Inside an organization, managers and employees must communicate with each other taking several strategies into account in order to effectively persuade the other. Managers and employees should use

- Warm words and a conversational tone to convey a caring tone
- Specific and detailed sentences to provide the required evidence
- Confident language and objective information that presents both risks and reward
- Use hedging language to convey respect for receivers opinions

The video below provides an overview of being persuasive in the digital age.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=181#h5p-78

Key Takeaway

- Use reliable strategies and persuasive indirect message patterns to persuade readers to buy products or services, adopt your ideas, or support initiatives.
- Apply the six persuasive principles to influence human behaviour
- Use the AIDA principles to construct effective persuasive messages
- Recognize the impact social media is having on persuasive messages

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 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. Make sure to follow the indirect AIDA pattern and involve some of the persuasive strategies discussed in this unit.

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CHAPTER 7: ELECTRONIC WRITTEN COMMUNICATION

We begin our applied-writing unit with electronic channels because they are by far the most popular both for personal and business use. Most students have grown up with these channels, which 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 way to 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.

7.1 EMAILING

Learning Objectives

After studying this unit, you will be able to

- identify characteristics of effective professional emails
- understand how to compose effective professional emails

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https://pressbooks.nscc.ca/nscccommtrades/?p=133#h5p-48

INTRODUCTION

The video introduced you to electronic mail, widely known as "e-mail" or just "email,". As the video noted, by volume, emails are 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*[1]—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, 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.

INTEGRATING THE 3 X 3 WRITING PROCESS

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

1. (Radicati, 2017)

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.

Begin by ensuring 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. If an email is necessary, however, then it must be effective. 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. Using the **3 x 3 Writing Process** (see Figure 7.1) gives you a road map to writing effective emails.

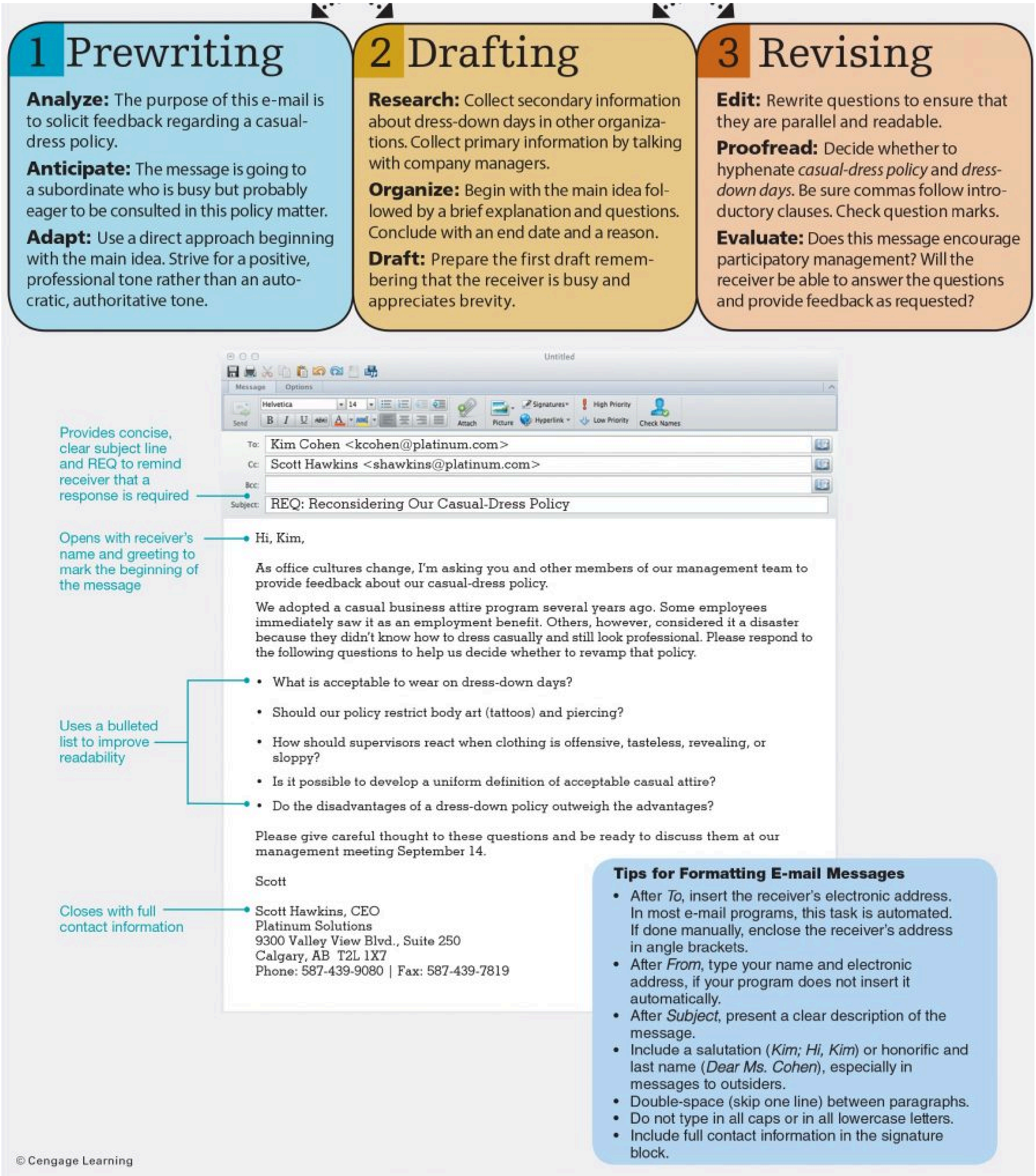

Figure 7.1 The produce effective emails that communicate your message, apply the 3 x 3 writing process of pre-writing, drafting and revising (Business Communications, 2019).

STRUCTURE AND CONTENT

Before delving into the details of how to construct emails, let's review the advantages, disadvantages, and occasions for their use.

Table 7.1 Excerpt: Email Pros, Cons, and Proper Use

Advantages	Disadvantages	Expectations	Appropriate Use
• Delivers messages instantly anywhere in the world • Sends to one or many people at once • Allows you to attach documents or links to internet sites. • Allows for a back-and-forth thread on the topic • Archives written correspondence • Can be done on any mobile device with wifi connection • Is somewhat permanent in that emails exist somewhere on a server even if deleted by both sender and receiver	•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 •May be sent automatically to the recipient's spam folder or otherwise overlooked or deleted without being •Subject to errors such as hitting "send" prematurely •Subject to limits on document attachment size •Requires a working internet connection on a computing device, which isn't available everywhere in the world	•Reply within 24 hours, or sooner if company policy requires it •Follow conventions for writing •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	•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

Email Address

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 with 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 email they are investigating a breach of company policy or criminal activity.[2] 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 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.

What's fundamentally important, however, is that you retire your teenage joke email address. If you have one of these, 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 is going to delete it without even opening it.

Also, just as your demeanour and language style changes in social, family, and professional contexts, you should 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.[3] 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.

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

2. (Office of the Privacy Commissioner of Canada, 2010)

3. (Radicati, 2017).

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.

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.

Subject Line

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 the subject line acts as a title for the email, the subject line should accurately summarize its topic in 3-7 words.

The 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 7.2 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 7.2: 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 11:31 p.m.
Meeting	Rescheduling Nov. 6 meeting	Rescheduling our 3 p.m. 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), 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, the subject line text will be essential to your ability to retrieve that file later. 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.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=133#h5p-49

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 7.3 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 7.3: Opening Salutation Examples

First-time Formality	Ongoing Semiformal	Informal
Dear Ms. Melody Nelson: *Dear Ms. Nelson:* *Greetings, Ms. Melody Nelson:* *Greetings, Ms. Nelson:*	Hello, Melody: Hello again, Melody: Thanks, Melody. (in response to something given)	Hi Mel, Hey Mel, Mel,

Notice that the punctuation includes a comma after the greeting word and a colon after their name for formal and semiformal occasions. 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, 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. 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. Wait before entering their name in the recipient or “To” field in case you accidentally hit the Send button before you’re finished drafting your email. If you prematurely send an email, immediately send a quick follow-up apologizing for the confusion and the completed message. 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/complimentary 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. 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 underway 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. 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. Emails are not private. You have no control over whether the recipients will forward an email on to others , and 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.

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 unit 11 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 7.4 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. 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 7.4 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.

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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Message Body

Emails long enough to divide into paragraphs follow the three-part message organization 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. In fact, one-sentence paragraphs (single spaced with a line of space between each) and bullet-point lists 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. 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.

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 4 p.m. 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.

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 7.5 below.

Table 7.5: Closing Salutation Examples

Formal	Semiformal	Informal
Best wishes, Kind regards, Much appreciated, Sincerely, Warm regards,	Best, Get better soon, Good luck, Take care, Many thanks,	All good things, Be well, Bye for now, Cheers, Ciao,

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 17.5 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.

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 7.6 below.

Table 7.6: 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.

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 25 MB, whereas Outlook/Hotmail allow only 10 MB 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 5 GB for no-cost to 10 TB 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 when 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.

Before Sending Your Email

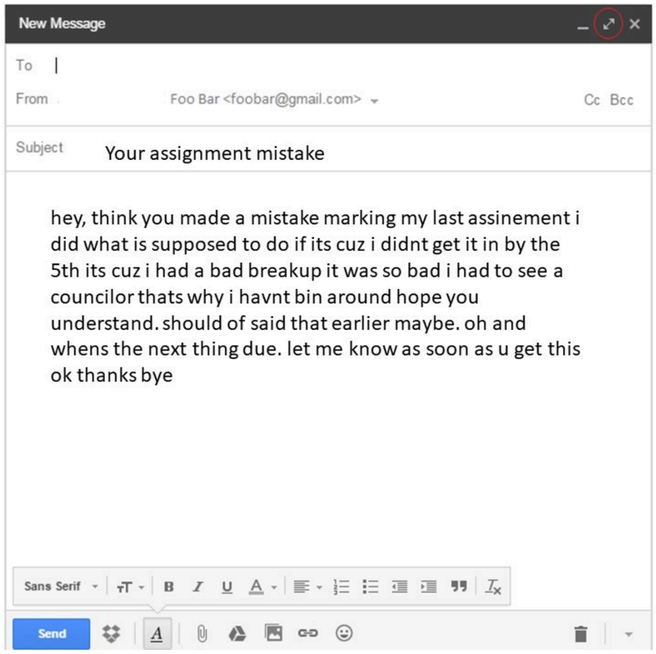
Before hitting the send button, follow through on the entire writing process, especially the Editing stage with its evaluation, revision, and proofreading sub-stages. Put yourself in your reader's position and assess whether you've achieved the purpose you set out to achieve in the first place. Evaluate also if you've struck the appropriate tone and formality. If you're aware that your tone is too angry, for instance, save the message in the drafts folder and take time to 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 section 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.

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.

Knowledge Check

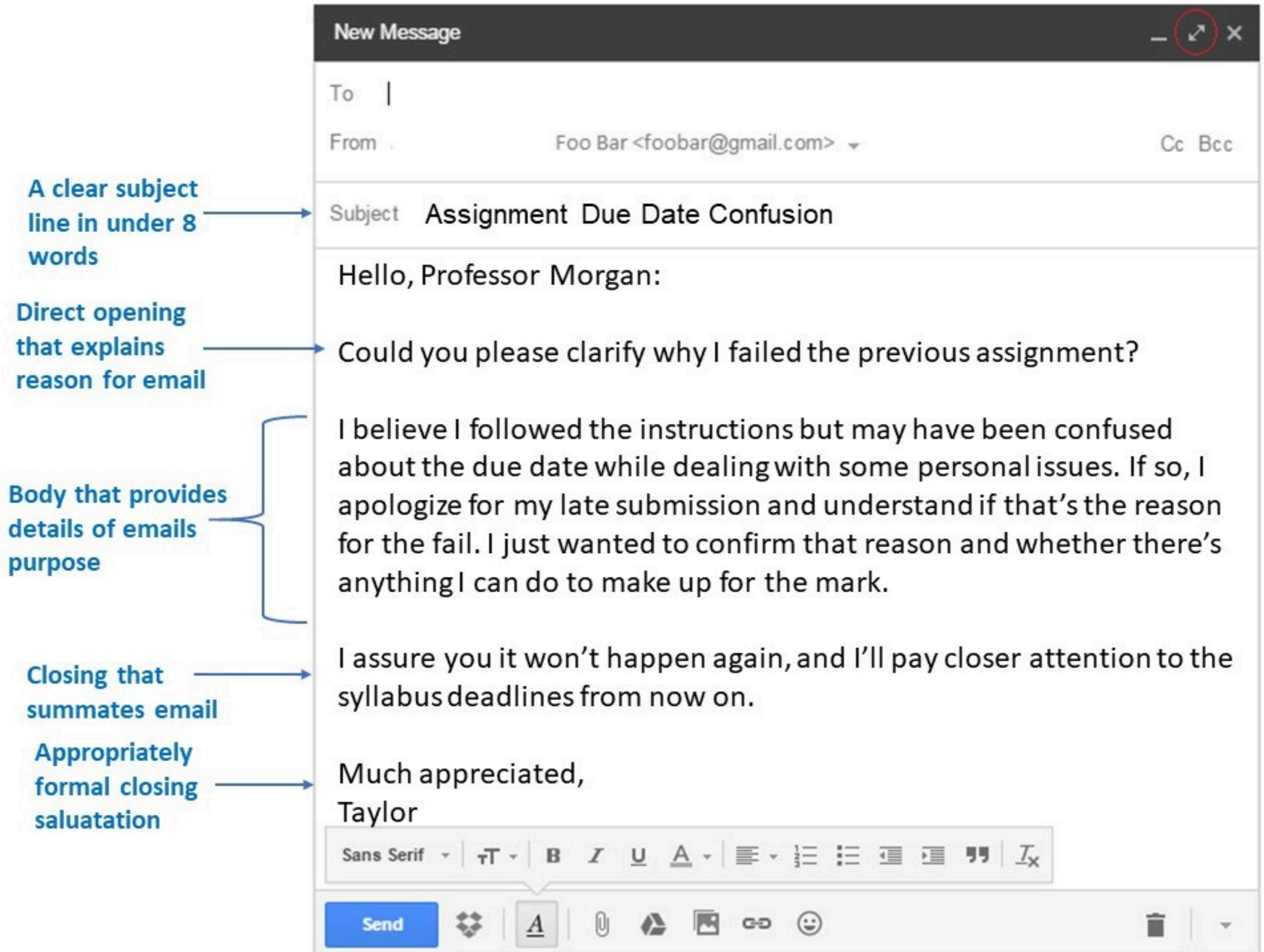
Editing a Poorly Written Information Request Email. Review the following two examples to check your knowledge on email structure and content.

Sample 1: Review the following poorly written email.



Analysis: 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 *counsellor*), 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.

Sample 2: Now review the revised email.



Analysis: 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 suggests 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.

Figure 7.2: A summary of important tips to composing effective emails (Doyle, 2019).

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 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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7.2 NETIQUETTE AND SOCIAL MEDIA

Learning Objectives

After studying this unit, you will be able to 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[1], 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.

SHEA'S NETIQUETTE

Virginia Shea's Rules of Netiquette offer helpful guidelines for online behaviour:

- 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.

1. Harris, K. (2015, September 17). How political operatives dig up dirt to take down candidates. CBC News. Retrieved from http://www.cbc.ca/news/politics/canada-election-2015-vetting-candidates-media-1.3229594

- 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.

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.[2]

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

2. Tahmincioglu, E. (2009, October 11). Your boss wants you on Twitter: Companies recognizing the value of having workers promote products. MSNBC Careers. Retrieved from http://www.msnbc.msn.com/id/33090717/ns/business-careers

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.

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 run their social media presence, but small businesses can do much of it themselves if they follow some decent online advice such as the following:

- The Do's and Don'ts of How to Use Facebook for Business [Infographic][3]
- The Ultimate Guide to Twitter for Small Business in 2017[footnote]Jackson, D. (2016, December 20). The ultimate guide to Twitter for small business in 2017. Retrieved from https://sproutsocial.com/insights/twitter-for-small-business/[/footnote]
- How to Use Instagram for Business: A Complete Guide for Marketers[4]

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.

3. Mineo, G. (2017, September 19). The do's and don'ts of how to use Facebook for business [Infographic]. Retrieved from https://blog.hubspot.com/marketing/dos-donts-facebook-business-infographic

4. Dawley, S. (2018, January 30). How to use Instagram for business: A complete guide for marketers. Retrieved from https://blog.hootsuite.com/how-to-use-instagram-for-business/

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.

7.3 TEXTING AND INSTANT MESSAGING

Learning Objectives

After studying this unit, you will be able to 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 and clear 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 a while. 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.

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:

i. How old were you when you got your first mobile phone?
ii. When did you send your first text?
iii. How many texts do you send per day, on average, now?
iv. 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?
v. 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?
vi. 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 8: TRADITIONAL WRITTEN COMMUNICATION

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.

8.1 LETTERS

Learning Objectives

After studying this unit, you will be able to

- identify the parts of effective letters
- identify the different types of letter formats
- compose an effective letter

INTRODUCTION

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 communications within an organization. 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.

TYPES OF LETTER FORMATS

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.

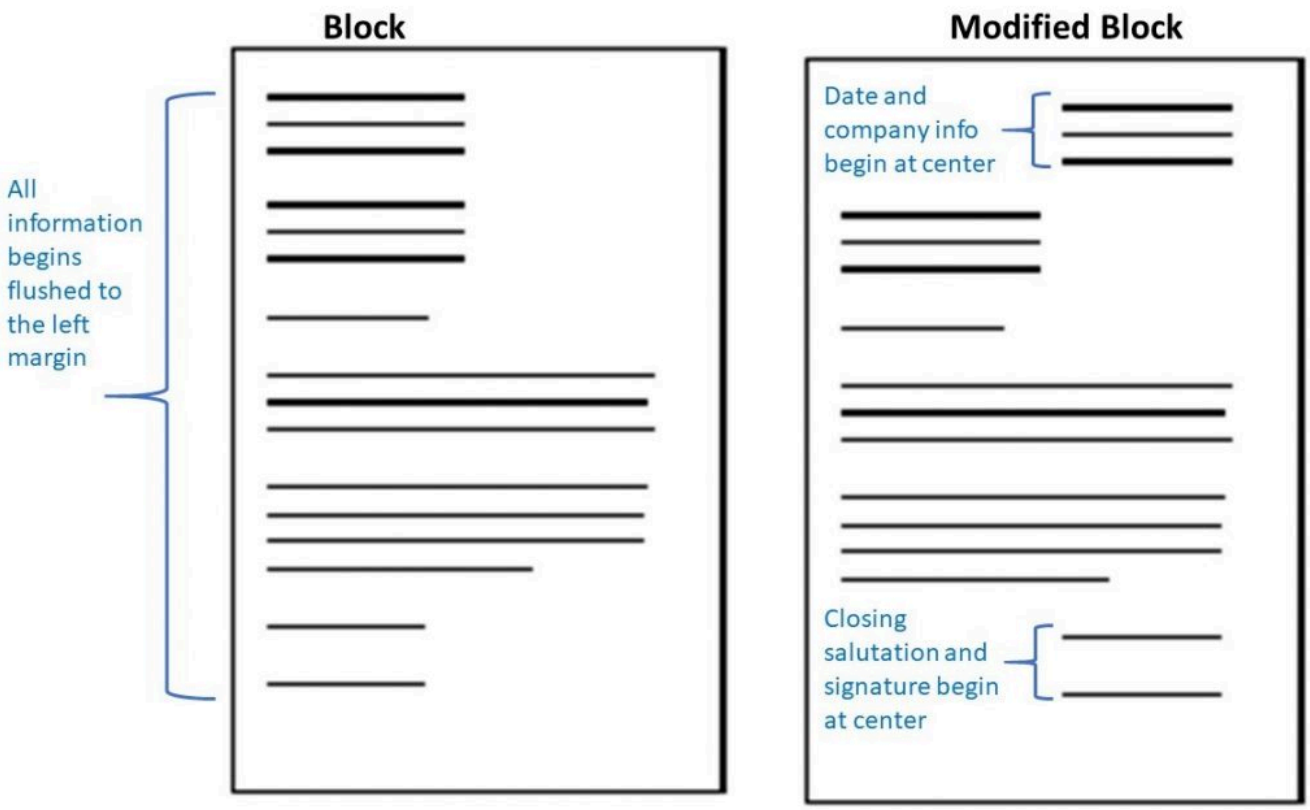


Figure 8.1.1: The two main letter formats used in business communications.

LETTER PARTS

Letters have 10 – 12 parts, including: Return Address or Company Letterhead, Date Line, Recipient Address, Subject Reference, Opening Salutation, Message Opening, Message Body, Message Closing, Closing Salutation, Signature, Signature Block, Enclosure Notice. The following video explains each part of a standard letter.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=146#h5p-51

Before delving into the details of how to compose a letter, let's review the advantages, disadvantages, and occasions for using letters.

Table 8.1.1 Excerpt: Letter Pros, Cons, and Proper Use

Advantages	Disadvantages	Expectations	Appropriate Use
•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)	•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	•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	•For providing a formal, permanent, confidential written message to a single important person or organization •Ideal for job applications persuasive messages bad-news messages, matters with possible legal implications, and responses to letters •For non-urgent matters

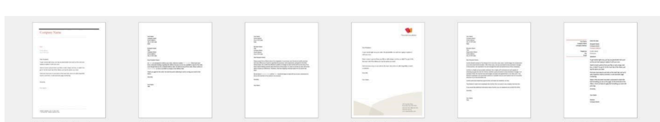
CONSTRUCTING A PROFESSIONAL LETTER

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

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[1].



1. (Microsoft Office, 2014)

Figure 8.1.2: 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 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 2.5 cm margins, that would be at around the 8.25 cm 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 2.5 cm 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.

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.

Recipient Address (receiver's block)

No matter what style of letter you use, the recipient's 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 20.2 below.

Table 8.1.2: 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.

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 unit 17), only the letter's subject reference begins with "**Re:**" or "RE:" or "Subject:" 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 beside the date line, a blank line of space separates this from the other parts above and below.

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https://pressbooks.nscc.ca/nscccommtrades/?p=146#h5p-52

Opening Salutation

The most common opening salutation for a letter is given in Table 20.3 below:

Table 8.1.3: 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.

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 unit 11 , 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 unit 11 for more on the indirect approach).

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=146#h5p-53

Message Body

Whether the opening takes the direct or indirect approach, the body supports this with explanatory detail (see §unit 11 on message bodies). Ensure that your message body abides by the 6 Cs of (see unit 13), 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 unit 14). 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. 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.

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 unit 11 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. If an action is required, be sure to indicate when you would expect to follow through.

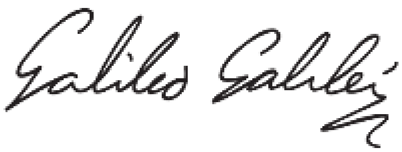
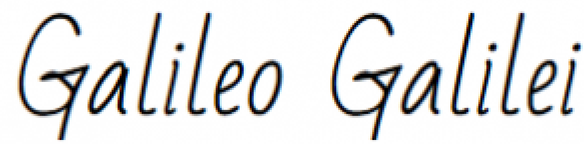
Closing Salutation

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 21.4 below.

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 20.4 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 8.1.4: How to Make Signatures for Electronically Written and Sent Letters

Signature Image	Simulated Signature
Sincerely,  Galileo Galilei, Astronomer Image source: [Connormah](#) (2009) 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 blanks lines of space above and below it so that it fits snugly between the closing salutation and your full printed name.	Sincerely,  Galileo Galilei, Astronomer 1. Your product warranty claim seems valid. Your product warranty claim seems valid. Your product warranty claim seems valid. Your product warranty claim seems valid. vType 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[2] 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

2. Nazareth, L. (2017, October 17). The gig economy is here – and we aren't ready. The Globe and Mail. Retrieved from https://www.theglobeandmail.com/report-on-business/rob-commentary/the-gig-economy-is-here-and-we-arent-ready/article36678505/

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.

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 in 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.

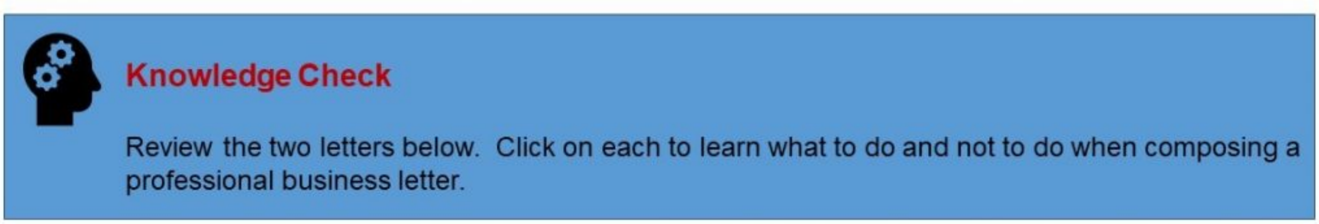
Sometimes letters are written on someone else's behalf, perhaps by an administrative assistant. In such cases, the signature and typed-out name of the person responsible for the letter is given at the bottom, then the initials of the person who typed it appear after a line of space below the last line of the signature block.

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.



Sample 1 – Ineffective Letter

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=146#h5p-54

Sample 2: Revised Letter

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https://pressbooks.nscc.ca/nscccommtrades/?p=146#h5p-55

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 Part 5 to ensure that the letter fulfills its purpose and represents you well with its flawless attention to detail.

For more perspectives on business letters, including slight format variations, see the following resources:

- How to Format a Business Letter[3]
- Writing the Basic Business Letter[4]
- How to Write a Business Letter[5]

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.

3. Doyle, A. (2018, April 6). How to format a business letter. The Balance Careers. Retrieved from https://www.thebalancecareers.com/how-to-format-a-business-letter-2062540
4. Purdue OWL. (n.d.). Writing the basic business letter. Retrieved from https://owl.english.purdue.edu/owl/resource/653/01/
5. wikiHow. (2018, May 14). How to write a business letter. Retrieved from https://www.wikihow.com/Write-a-Business-Letter

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 unit 17, 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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Leuca, A. (2008, March 13). Modified block business letter. Retrieved from http://www.savvy-business-correspondence.com/ModifiedBlockBizLetter.html

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Meyer, C. (2017). *Communicating for results* (4th ed.). Don Mills, ON: Oxford University Press. Retrieved from https://oup-arc.com/access/meyer-4e-student-resources#tag_case-studies

8.2 MEMOS

Learning Objectives

After studying this unit you will be able to

- identify memo structure and content
- write a traditional memo

INTRODUCTION

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 an individual. 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.

Writing a Clear Business Memo Video[1]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=152#h5p-56

Before exploring memos in more detail, let's review the advantages, disadvantages, and occasions for using memos given earlier in Table 8.2.1 on channel selection.

Table 8.2.1 Excerpt: Memo Pros, Cons, and Proper Use

1. GCFLearnFree.org. (2018). Writing a clear business memo [Video file]. Retrieved from https://www.youtube.com/watch?v=eHZdnldGuls

Advantages	Disadvantages	Expectations	Appropriate Use
•Provides a written record of group decisions, announcements, policies, and procedures within an organization •Can deliver short reports and negotiating terms (e.g., memo of understanding) •Can be posted on a physical bulletin board or sent by email	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.	•Use template with company letterhead •Follow the same conventions as email, except omit the opening and closing salutations and e-signature	•For a written record for decisions, announcements, policies, procedures, and short reports shared within an organization •Post a printed version on an office bulletin board and email to all involved

MEMO PURPOSE

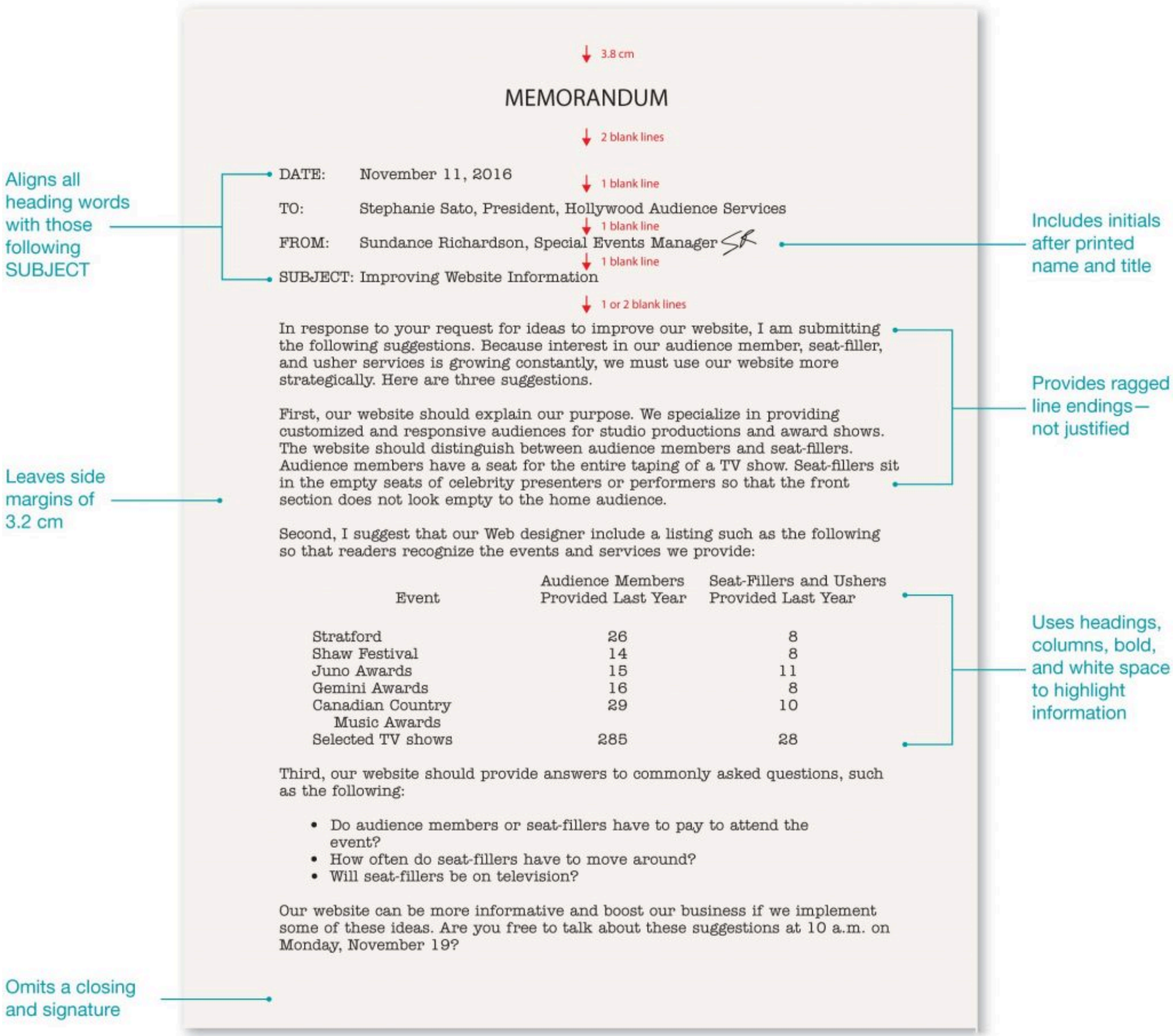
A memo's purpose is often to inform, but it occasionally includes an element of persuasion or call to action. Memos are most appropriately used for internal organizational messages that may be too detailed or too long to be communicated via an email. Memos allow organizations to clearly spell-out for 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, it may also issue a memorandum about that action. 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. Memos usually carry nonsensitive and routine information; therefore, most emails will be written using the direct approach.

MEMO FORMAT

A memo has four distinct sections: **header, purpose statement, body, and call-to-action.** Memos often have letterheads with the word "MEMO" written clearly with the company name and logo at the top of the page. Below are the header fields identifying the recipient, author, date, and subject much like you would see in an email. In fact, email 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.

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 each section of a memo in more detail. Figure 8.2.1[2] provides a sample memo for review.

2. Guffey, M., Loewry, D., & Griffin, E. (2019). Business communication: Process and product (6th ed.). Toronto, ON: Nelson Education. Retrieved from http://www.cengage.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9780176531393&template=NELSON


MEMORANDUM

DATE: November 11, 2016

TO: Stephanie Sato, President, Hollywood Audience Services

FROM: Sundance Richardson, Special Events Manager SR

SUBJECT: Improving Website Information

In response to your request for ideas to improve our website, I am submitting the following suggestions. Because interest in our audience member, seat-filler, and usher services is growing constantly, we must use our website more strategically. Here are three suggestions.

First, our website should explain our purpose. We specialize in providing customized and responsive audiences for studio productions and award shows. The website should distinguish between audience members and seat-fillers. Audience members have a seat for the entire taping of a TV show. Seat-fillers sit in the empty seats of celebrity presenters or performers so that the front section does not look empty to the home audience.

Second, I suggest that our Web designer include a listing such as the following so that readers recognize the events and services we provide:

Event	Audience Members Provided Last Year	Seat-Fillers and Ushers Provided Last Year
Stratford	26	8
Shaw Festival	14	8
Juno Awards	15	11
Gemini Awards	16	8
Canadian Country Music Awards	29	10
Selected TV shows	285	28

Third, our website should provide answers to commonly asked questions, such as the following:

- Do audience members or seat-fillers have to pay to attend the event?
- How often do seat-fillers have to move around?
- Will seat-fillers be on television?

Our website can be more informative and boost our business if we implement some of these ideas. Are you free to talk about these suggestions at 10 a.m. on Monday, November 19?

Figure 8.2.1: A general overview of four components of a memo: header, purpose, body, and call-to-action.

Header: The header of a memo provides logistical information:

- The **Date** provides the complete and current date. To avoid confusion, always spell the date out: June 5, 2020, not 06/05/2020.
- The **To** line identifies to whom the message is addressed. Depending on the size of the company or department, the receiver's full name and title may also be included.
- The **From** line identifies the sender of the message. Again, full name and title may be required.
- The **Subject** line identifies the topic of the memo. Subject lines must be specific, composed of descriptive nouns (8 words or less), not full sentences, and each major word should be capitalized.

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https://pressbooks.nscc.ca/nscccommtrades/?p=152#h5p-49

Purpose: The first paragraph of the memo contains the most important information. The reason for writing the memo as well as the action requested of the receiver should be stated directly in this paragraph. Get to the point as quickly as possible using only 1-2 sentences to state the information.

Figure 8.2.2[3]

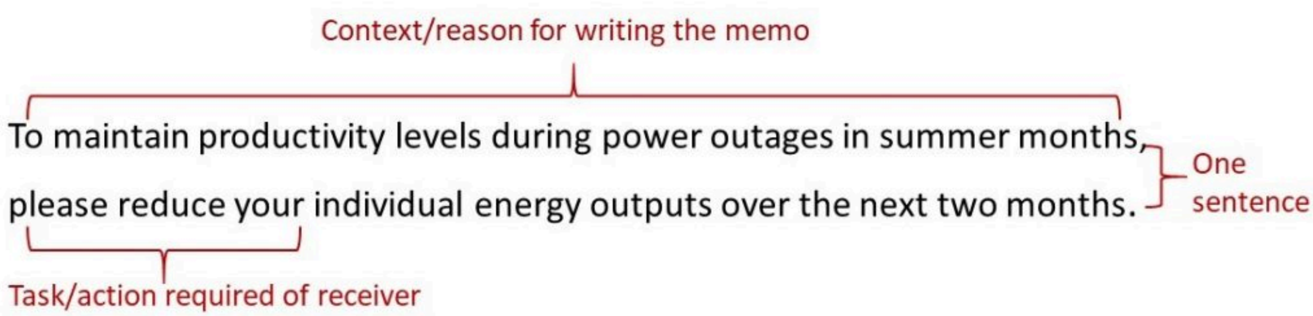


Figure 8.2.2: An example of a one sentence opening paragraph for a memo stating the reason for writing and the requested receiver task.

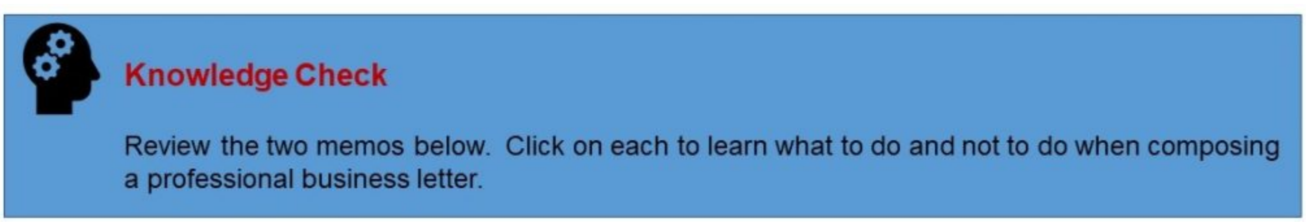
Body: The middles paragraphs of a memo provide more detailed information about the context or problem and the task, assignment, or action required. The body of a memo may be multiple paragraphs depending on the memo's subject matter. Each paragraph should be between 3 – 5 sentences. Use of graphic highlights: lists, tables, headers, etc., are encouraged for this section of the memo to achieve conciseness and to increase readability. Make sure the body paragraphs answer receiver questions and clearly identify a deadline and people involved.

Call-to-Action: The final paragraph of a memo summarizes content, states next steps, invites feedback, provides resources and offers contact information. The final paragraph should also ensure goodwill, but avoid cliche sayings. Use specific and concrete statements to ensure receiver understanding

Example:

Vague: Please contact me at your earliest convenience.

Concrete: Please call my direct line (ext. 222) by end of day Monday, June 22.



Sample 1: Ineffective Memo

3. Meyer, C. (2017). Communicating for results (4th ed.). Don Mills, ON: Oxford University Press. Retrieved from https://oup-arc.com/access/meyer-4e-student-resources#tag_case-studies

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=152#h5p-57

Sample 2: Improved Memo

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https://pressbooks.nscc.ca/nscccommtrades/?p=152#h5p-58

TYPES OF MEMOS

Request Memos

A request memo does exactly what its name suggests, requests an action of the receiver. An effectively-composed request memo will clearly state the requested action within the opening paragraph of the memo. The explanation or justification for the request is included in the body of the memo, while being polite and using the "you" view will ensure the reader understands the benefits of completing the requested action. Requests that require a great deal of effort, time, or resources should follow the indirect approach to have the best chance of persuading the reader.

Reply

Similar to the request memo, the name of this memo also suggests its purpose: replying to a previous correspondence. When constructing the reply memo, respond to each request in the order made. Use the direct approach as the receiver will want your immediate response to each request without searching. If necessary, provide additional information that may be useful to the original request. Responding immediately to a request memo, especially if you've received a request from senior officials within the organization, shows efficiency and professionalism.

Follow-up Memos

A follow-up memo provides a written record of an oral conversation. For example, a memo that records a discussion of a recent meeting that confirms the time, place, date, participants, meeting purpose and decisions. Committing the basic facts, decisions, and issues discussed in a meeting ensures that memory does not become the basis for moving forward. Writing follow-up messages protects you and the receivers by ensuring a shared and common understanding of the important details and facts. The more important the oral conversation, the more important it is to ensure a written confirmation of the discussion is created.

Figure 8.2.3 [4]

4. Kopywriting Kourse. (2020). How to write an effective memo. Retrieved from https://kopywritingkourse.com/how-to-write-a-memo/

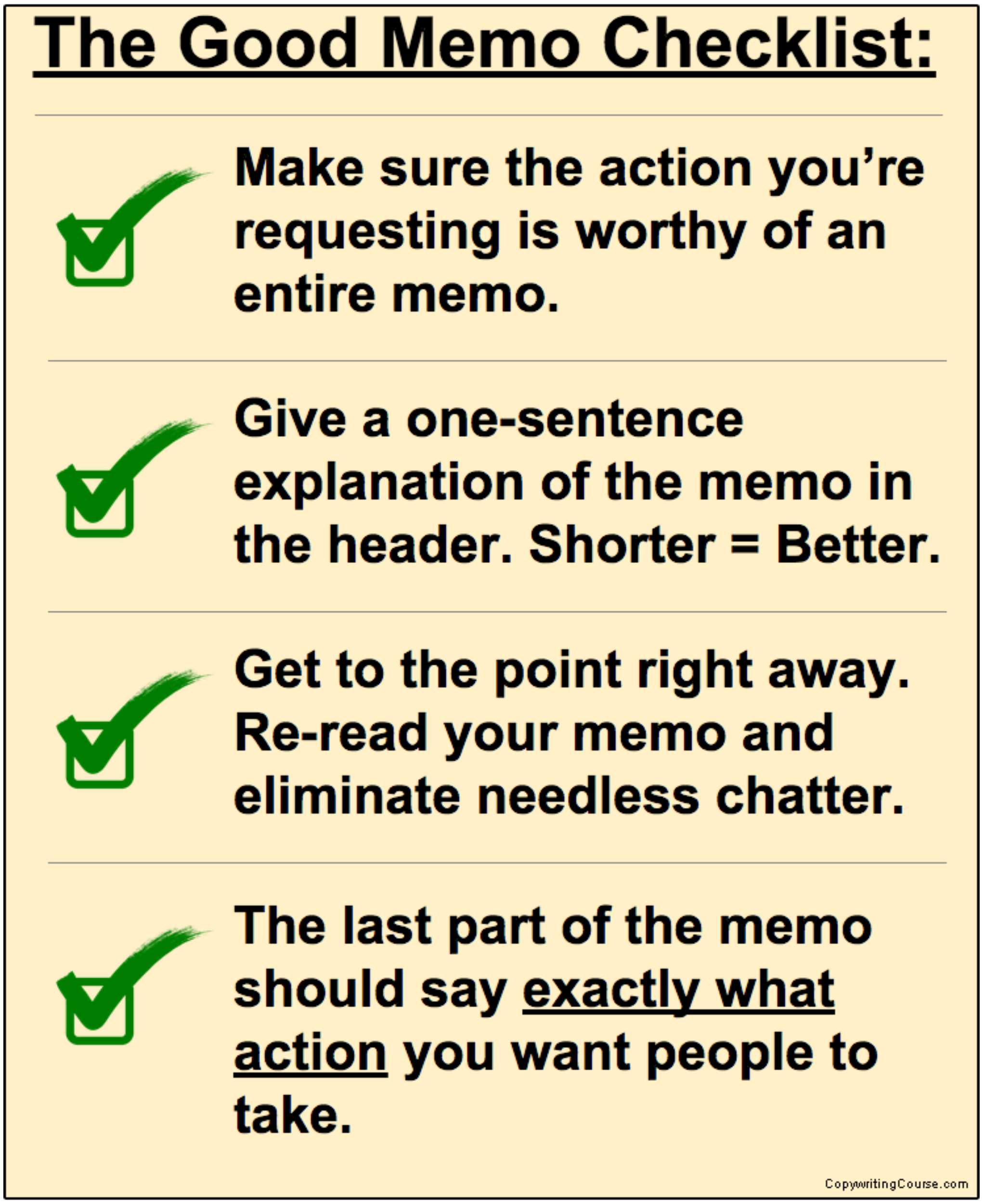


Figure 8.2.3: A few tips on writing well-structured emails

For more on memos, see the following resources:

- *Purdue OWL's four Memos modules, starting with [Audience and Purpose](https://owl.english.purdue.edu/owl/resource/590/1/)*[5]
- [How to Write a Memo](https://www.wikihow.com/Write-a-Memo)[6]

5. Perkins, C., & Brizee, A. (2018, March 23). Memos: Audience and Purpose. Purdue OWL. Retrieved from https://owl.english.purdue.edu/owl/resource/590/1/
6. wikiHow. (2018, May 14). How to write a memo. Retrieved from https://www.wikihow.com/Write-a-Memo

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 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 summary field study report (see unit 29) 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.

CHAPTER 9 COMMON TECHNICAL DOCUMENTS

Just as the literary genre of poetry contains many forms — such as sonnets, haiku, epics, limericks, *etc*., — each with its own set of rules and conventions, technical writing also contains many forms, and each form has some conventions that must be observed. This chapter discusses several of the most common document forms, and reviews the general requirements for content, formatting, and style.

9.1 PROPOSALS

SUZAN LAST

Proposals and progress reports are some of the most common types of reports you will likely find yourself writing in the workplace. These reports are persuasive in nature: proposals attempt to persuade the reader to accept the writer's proposed idea; progress reports assure the reader that the project is on time and on budget, or explain rationally why things might not be going according to the initial plan.

A proposal, in the technical sense, is a document that tries to persuade the reader to implement a proposed plan or approve a proposed project. Most businesses rely on effective proposal writing to ensure successful continuation of their business and to get new contracts. The writer tries to convince the reader that the proposed plan or project is worth doing (worth the time, energy, and expense necessary to implement or see through), that the author represents the best candidate for implementing the idea, and that it will result in tangible benefits.

Not that kind of proposal. [1]

Proposals are often written in response to a **Request For Proposals** (RFP) by a government agency, organization, or company. The requesting body receives multiple proposals responding to their request, reviews the submitted proposals, and chooses the best one(s) to go forward. Their evaluation

1. [Proposal image]. [Online]. Available: https://pixabay.com/en/couple-love-marriage-proposal-47192/. Pixabay License.

of the submitted proposals is often based on a rubric that grades various elements of the proposals. Thus, your proposal must **persuade** the reader that your idea is the one most worth pursuing. Proposals are persuasive documents intended to initiate a project and get the reader to authorize a course of action proposed in the document. These might include proposals to

- Perform a task (such as conducting a feasibility study, a research project, *etc.*)
- Provide a product
- Provide a service

Proposals can have various purposes and thus take many forms. They may include sections such as the following:

- Introduction and/or background
- Problem statement
- Purpose/motivation/goal/objectives
- Definition of scope and approach
- Review of the state of the art
- Technical background
- Project description
- Schedule of work/timeline
- Budget
- Qualifications
- Conclusion

FOUR KINDS OF PROPOSALS

There are 4 kinds of proposals, categorized in terms of whether or not they were requested, and whether they are meant to solve a problem within your own organization or someone else's. From the following descriptions, you will see that can they also overlap:

1. **Solicited Proposals:** an organization identifies a situation or problem that it wants to improve or solve and issues an RFP (Request for Proposals) asking for proposals on how to address it. The requesting organization will vet proposals and choose the most convincing one, often using a detailed scoring rubric or weighted objectives chart to determine which proposal best responds to the request.
2. **Unsolicited Proposals:** a writer perceives a problem or an opportunity and takes the initiative to propose a way to solve the problem or take advantage of the opportunity (without being requested to do so). This can often be the most difficult kind of proposal to get approved.
3. **Internal Proposals:** these are written by and for someone within the same organization. Since both the writer and reader share the same workplace context, these proposals are

generally shorter than external proposals, and usually address some way to improve a work-related situation (productivity, efficiency, profit, *etc*.). As internal documents, they are often sent as memos, or introduced with a memo if the proposal is lengthy.

4. **External Proposals**: these are sent outside of the writer's organization to a separate entity (usually to solicit business). Since these are external documents, they are usually sent as a formal report (if long), introduced by a cover letter (letter of transmittal). External proposals are usually sent in response to a Request for Proposals, but not always.

EXERCISE 9.1 Task Analysis

If you are writing proposal assignments, identify the kind of proposals you are tasked with writing by placing them within the grid below. Given the kinds of proposals you must write, what forms will you use (memo, letter, report, *etc*.)?

	Solicited	Unsolicited
Internal		
External		

PROPOSALS WRITTEN AS AN ASSIGNMENT IN A TECHNICAL WRITING CLASSES GENERALLY DO THE FOLLOWING:

1. Identify and define the problem that needs to be solved or the opportunity that can be taken advantage of. You must show that you clearly understand the problem/situation if you are to convince the reader that you can solve it. Rubrics that assess proposals generally place significant weight (~20%) on clarity and accuracy of the problem definition.
2. Describe your proposed project, clearly defining the scope of what you propose to do. Often, it is best to give a general overview of your idea, and then break it down into more detailed sub-sections.
3. Indicate how your proposed solution will solve the problem and provide tangible benefits. Specifically, indicate how it will meet the objectives and abide by the constrains outlined in the problem definition. Give specific examples. Show the specific differences between "how things are now" and "how they could be." Be as empirical as possible, but appeal to all appropriate persuasive strategies. Emphasize results, benefits, and feasibility of your proposed idea.
4. Include the practical details: propose a budget and a timeline for completing your project. Represent these graphically (budget table, and **Gantt chart)**. Your timeline should include the major milestones or deliverables of the project, as well as dates or time frames for completion of each step.
5. Conclude with a final pitch that summarizes and emphasizes the benefits of implementing your proposed idea – but without sounding like an advertisement.

ADDITIONAL PROPOSAL ELEMENTS TO CONSIDER

1. Describe your qualifications to take on and/or lead this project; persuade the reader that you have the required skills, experience, and expertise to complete this job.
2. Decide what graphics to use to illustrate your ideas, present data, and enhance your pitch.
3. Include secondary research to enhance your credibility and the strength of your proposal.
4. Choose format; is this a memo to an internal audience or a formal report to an external audience? Does it require a letter of transmittal?

All proposals must be convincing, logical, and credible, and to do this, they must consider audience, purpose and tone.

Irish and Weiss[2] urge readers to keep the following in mind:

> *An engineering proposal is not an advertisement. It must show, with objective language, clarity, and thoroughness, that the writers know what they are doing and will successfully complete the project.*

SAMPLE PROPOSAL ORGANIZATION

Each proposal will be unique in that it must address a particular audience, in a particular context, for a specific purpose. However, the following offers a fairly standard organization for many types of proposals:

Introduction/ Background	Clearly and fully defines the problem or opportunity addressed by the proposal, and **briefly** presents the solution idea; convinces the reader that there is a clear need, and a clear benefit to the proposed idea.
Project Description	Detailed description of solution idea and detailed explanation of how the proposed idea will improve the situation: 1. Confirm feasibility (is it do-able?) How will you find out? 2. Explain the specific benefits of implementing the idea and the consequences of not doing it 3. Give a detailed description or explanation of your proposed idea or methodology, and the resources needed to achieve goals 4. Address potential obstacles or objections; concede where appropriate
Credentials	Establish writer's qualifications and experience to lead this project.
Timeline and Budget	Provide a detailed timeline for completion of project (use a Gantt chart to indicate when each stage of the project will be complete). Provide an itemized budget for completing the proposed project.
Conclusion	This is your last chance to convince the reader; be persuasive!
References	List your research sources.

LANGUAGE CONSIDERATIONS

Proposals are fundamentally *persuasive* documents, so paying attention to the rhetorical situation—position of the reader (upward, lateral, downward or outward communication), the purpose of the proposal, the form, and the tone—is paramount.

- Clearly define your purpose and audience before you begin to write

2. R. Irish and P. Weiss, *Engineering Communication: From Principle to Practice*, 2nd Ed., Don Mill, ONT: Oxford UP, 2013.

- Be sure you have done research so you know what you are talking about
- Remain positive and constructive: you are seeking to *improve* a situation
- Be solution oriented; don't blame or dwell on the negative
- Make your introduction very logical, objective, and empirical; don't start off sounding like an advertisement or sounding biased; avoid logical fallacies
- Use primarily logical and ethical appeals; use emotional appeals sparingly

As always, adhere to the 7 Cs by making sure that your writing is

- ***Clear and Coherent:*** don't confuse your reader with unclear ideas or an illogically organized structure.
- ***Concise and Courteous***: don't annoy your reader with clutter, unnecessary padding, inappropriate tone, or hard-to-read formatting.
- ***Concrete and Complete***: avoid vague generalities; give specifics. Don't leave out necessary information.
- ***Correct***: don't undermine your professional credibility by neglecting grammar and spelling, or by including inaccurate information.

THE LIFE CYCLE OF A PROJECT IDEA

A great idea does not usually go straight from proposal to implementation. You may think it would be a great idea to construct a green roof on top of the Clearihue building, but before anyone gives you the go ahead for such an expensive and time-consuming project, they will need to know that you have done research to ensure the idea is cost effective and will actually work. **Figure 9.2.1** breaks down the various stages a project might go through, and identifies some of the typical communications tasks that might be required at each stage.

Most ideas start out as a proposal **to determine** if the idea is really feasible, or **to find out** which of several options will be most advantageous. So before you propose the actual green roof, you *propose to study whether or not it is a feasible* idea. Before you recommend a data storage system, you *propose to study 3 different systems to find out which is the best one for this particular situation*. Your proposal assumes the idea is worth looking into, convinces the reader that it is worth spending the time and resources to look into, and gives detailed information on *how* you propose to do the "finding out."

Figure 9.2.1 *Phases of a project and some accompanying communications tasks.*[3] [Image Long Description]

Once a project is in the implementation phase, the people who are responsible for the project will likely want regular status updates and/or progress reports to make sure that the project is proceeding on time and on budget, or to get a clear, rational explanation for why it is not.

3. [Lightbulb image]. [Online]. Available: https://www.iconfinder.com/icons/667355/aha_brilliance_idea_think_thought_icon. *Free for commercial use*.

9.2 PROGRESS REPORTS

SUZAN LAST

You write a progress report to inform a supervisor, associate, or client about progress you have made on a project over a specific period of time. Periodic progress reports are common on projects that go on for several months (or more). Whoever is paying for this project wants to know whether tasks are being completed on schedule and on budget. If the project is not on schedule or on budget, they want to know why and what additional costs and time will be needed.

Progress reports answer the following questions for the reader:

- How much of the work is complete?
- What part of the work is currently in progress?
- What work remains to be done?
- When and how will the remaining work be completed?
- What changes, problems or unexpected issues, if any, have arisen?
- How is the project going in general?

PURPOSE OF A PROGRESS REPORT

The main function of a progress report is persuasive: to reassure clients and supervisors that you are making progress, that the project is going smoothly, and that it will be completed by the expected date — or to give reasons why any of those might not be the case. They also offer the opportunity to do the following:

- Provide a brief look at preliminary findings or in-progress work on the project
- Give your clients or supervisors a chance to evaluate your work on the project and to suggest or request changes
- Give you a chance to discuss problems in the project and thus to forewarn the recipients
- Force you to establish a work schedule, so that you will complete the project on time.

FORMAT OF A PROGRESS REPORT

Depending on the size of the progress report, the length and importance of the project, and the recipient, a progress report can take forms ranging from a short informal conversation to a detailed, multi-paged report. Most commonly, progress reports are delivered in following forms:

- **Memo**: a short, semi-formal report to someone within your organization (can range in length from 1-4 pages)
- **Letter**: a short, semi-formal report sent to someone outside your organization
- **Formal report:** a long, formal report sent to someone within or outside of your organization
- **Presentation**: an oral presentation given directly to the target audience.

ORGANIZATIONAL PATTERNS FOR PROGRESS REPORTS

The recipient of a progress report wants to see what you've accomplished on the project, what you are working on now, what you plan to work on next, and how the project is going in general. The information is usually arranged with a focus either on time or on task, or a combination of the two:

- **Focus on time:** shows time period (previous, current, and future) and tasks completed or scheduled to be completed in each period
- **Focus on specific tasks:** shows order of tasks (defined milestones) and progress made in each time period
- **Focus on larger goals**: focus on the overall effect of what has been accomplished.

Information can also be arranged by report topic. You should refer to established milestones or deliverables outlined in your original proposal or job specifications. Whichever organizational strategy you choose, your report will likely contain the elements described below.

Progress Reports – Structural Overview

1. Introduction

Review the details of your project's purpose, scope, and activities. The introduction may also contain the following:

- date the project began; date the project is scheduled to be completed
- people or organization working on the project
- people or organization for whom the project is being done
- overview of the contents of the progress report.

2. Project status

This section (which could have sub-sections) should give the reader a clear idea of the current status of your project. It should review the work completed, work in progress, and work remaining to be done on the project, organized into sub-sections by time, task, or topic. These sections might include

- Direct reference to milestones or deliverables established in previous documents related to the project

- Timeline for when remaining work will be completed
- Any problems encountered or issues that have arisen that might affect completion, direction, requirements, or scope.

3. **Conclusion**

The final section provides an overall assessment of the current state of the project and its expected completion, usually reassuring the reader that all is going well and on schedule. It can also alert recipients to unexpected changes in direction or scope, or problems in the project that may require intervention.

4. **References** section if required.

9.3 TECHNICAL DESCRIPTIONS AND DEFINITIONS

SUZAN LAST

Descriptive technical writing uses a combination of visuals and text to both "show" and "tell" the reader about the information being conveyed. Like more creative descriptions, technical descriptions sometimes draw on the "five senses" and metaphorical comparisons (analogies) to allow the reader to fully conceptualize what is being described. More often, however, they rely on concrete, measurable descriptors. Technical descriptions can take many forms, depending on purpose and audience. Descriptions can range from a brief sentence, to a paragraph, a whole section of a report, or an entire manual. Poorly written technical descriptions can cause confusion, waste time, and even result in catastrophe! Technical product descriptions are often legally required to ensure safety and compliance. Attention to detail is critical.

Product specifications require detailed descriptions of design features; instructions often require specific descriptive detail to "show" the reader what to do. Some general categories of technical descriptions include the following:

- **Mechanism Descriptions:** provide a detailed overview the physical aspects of a tool, machine or other mechanical device that has moving parts and is designed to perform a specific function. These could be product descriptions for sales or manufacturing, documentation of design specifications, info-graphics, *etc*. This chapter focuses in detail on this kind of description.
- **Process Descriptions:** detail a series of events (*natural/biological/ecological, mechanical, social, or psychological phenomenon*) that happen in particular sequence in order to achieve a specific outcome. These can be categorized into ***non-instructional*** processes (such as a process analyses of how an internal combustion engine works, or natural processes like photosynthesis) and ***instructional*** process (such as recommended/required procedures and explicit step-by-step instructions to be followed). (See Section 7.7 for detailed information on **Writing Instructions**).
- **Definitions:** clarify the specific meaning, often related to a specific context, or express the essential nature of the terms being defined. These can range in length from a simple clarifying phrase to an extended document of several pages. Definitions will often include detailed descriptions and visuals to illustrate ideas. Click on the link below to view a student PowerPoint presentation on how to write effective definitions for technical purposes. This

presentation is included with express permission of the student.

[Definitions in Technical Writing – Sample student presentation (.pdf)]

TECHNICAL DESCRIPTION OF A MECHANISM

Mechanism descriptions should provide a clear understanding of the object being described, including

- General appearance and physical properties
- Overall function/purpose
- Component parts
- How the parts interact to create a functioning whole.

The reader should be able to clearly picture, and therefore understand, the nature of the object being described, what it does, and how it works.

In order to achieve this clarity for the reader, the writer must choose significant details and organize information logically. Select details that can be described precisely and measurably, such as

color	materials	texture, smell, taste
shape	component parts	finish
size	properties	patterns, designs
dimensions	principles at work	interactions

Depending on the reader's need, the description may range from a general overview requiring only a few sentences to a multi-chapter manual detailing every aspect of the mechanism's parts and functions in order to troubleshoot technical problems and complete repairs. For a fun example of the latter, see the *Star Trek: The Next Generation: Technical Manual* (cover depicted in **Figure 7.4.1**), which provides detailed descriptions of all equipment and technology used aboard the fictional U.S.S. Enterprise-D.

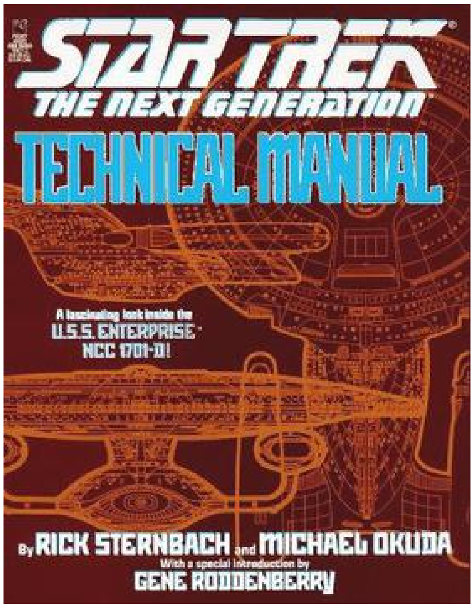


Figure 7.4.1 *Cover Page of "Star Trek: The Next Generation: Technical Manual".*[1]

Before you begin to draft your description, you must consider your **purpose** and **audience**: Why does your audience need this description? What will they use it for? Are you describing different types of solar panels for the average consumers to help them choose the one that best fits their needs? Are you providing schematics to technicians and installers?

Once you have your purpose and audience clearly in focus, draft a description that includes the following elements:

1. ***Definition***: What is it, and what is its main purpose?
2. ***Overview***: Describe the mechanism's overall appearance ("big picture" description of its overall size, shape, general appearance).
3. ***Components***: Describe the main component parts in labelled sections; consider the order of information carefully here. Create a logical connection between each component described.
4. ***Explanation:*** how do the parts work together to fulfill its function? What key principles govern its functioning? Consider how much detail is necessary here for your intended audience.
5. ***Visuals:*** include graphics that clearly illustrate the mechanism and/or its parts. Show the device as a whole; consider showing specific details in expanded views, cut-aways, or labelled diagrams. You may even embed or link to videos showing the device in action.
6. ***Conclusion***: depending on the purpose, you might review product's history, availability, manufacturing, costs, warnings, *etc*.)
7. ***References***: Sources you have used in your description, or additional sources of information available (if relevant).

You might consider using a template, like the Technical Description Template below, keeping in mind that while templates can be helpful guides, they do not provide much flexibility and may not work for all situations.

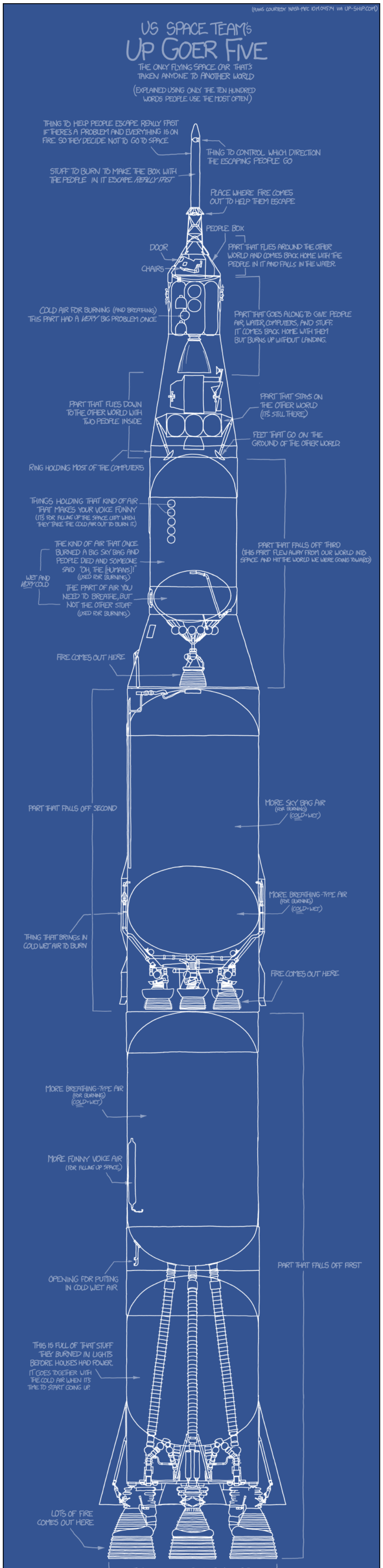
Technical Description Template

1. R. Sturnback and M. Okuna, *Star Trek: The Next Generation: Technical Manual*. New York: Pocket Books, 1991.

Audience and Purpose	Who will read this description and why?
Definition and Function	What is it? What does it do? What is its function/purpose?
Overview	Describe its overall appearance (shape, size, color, *etc.*)
Components and Explanations	Describe the component parts (chose most relevant features) and explain how they work together; try to find the most logical way to organize this explanation.
Visuals	What kind of illustrative graphics will you use? Where? • Diagrams • Photographs • Cut-away views • Exploded views
Conclusion	Do you need to offer any further information? History? Warnings? Context? Costs? *etc.*
References	Any sources used, or supplemental sources to suggest

SAMPLE DESCRIPTIONS

Examine the description of the "Up Goer Five" in **Figure 7.4.2** (click on image for larger version). Who might the intended audience be?



(PLANS COURTESY NASA-MFC 10M04574 VIA UP-SHIP.COM)
US SPACE TEAM'S
UP GOER FIVE
THE ONLY FLYING SPACE CAR THAT'S TAKEN ANYONE TO ANOTHER WORLD
(EXPLAINED USING ONLY THE TEN HUNDRED WORDS PEOPLE USE THE MOST OFTEN)
THING TO HELP PEOPLE ESCAPE REALLY FAST IF THERE'S A PROBLEM AND EVERYTHING IS ON FIRE SO THEY DECIDE NOT TO GO TO SPACE
THING TO CONTROL WHICH DIRECTION THE ESCAPING PEOPLE GO
STUFF TO BURN TO MAKE THE BOX WITH THE PEOPLE IN IT ESCAPE REALLY FAST
PLACE WHERE FIRE COMES OUT TO HELP THEM ESCAPE
PEOPLE BOX
DOOR
CHAIRS
PART THAT FLIES AROUND THE OTHER WORLD AND COMES BACK HOME WITH THE PEOPLE IN IT AND FALLS IN THE WATER.
COLD AIR FOR BURNING (AND BREATHING) THIS PART HAD A VERY BIG PROBLEM ONCE
PART THAT GOES ALONG TO GIVE PEOPLE AIR, WATER, COMPUTERS, AND STUFF. IT COMES BACK HOME WITH THEM BUT BURNS UP WITHOUT LANDING.
PART THAT FLIES DOWN TO THE OTHER WORLD WITH TWO PEOPLE INSIDE
PART THAT STAYS ON THE OTHER WORLD (IT'S STILL THERE)
FEET THAT GO ON THE GROUND OF THE OTHER WORLD.
RING HOLDING MOST OF THE COMPUTERS
THINGS HOLDING THAT KIND OF AIR THAT MAKES YOUR VOICE FUNNY (IT'S FOR FILLING UP THE SPACE LEFT WHEN THEY TAKE THE COLD AIR OUT TO BURN IT.)
THE KIND OF AIR THAT ONCE BURNED A BIG SKY BAG AND PEOPLE DIED AND SOMEONE SAID "OH, THE [HUMANS]!" (USED FOR BURNING)
WET AND VERY COLD
THE PART OF AIR YOU NEED TO BREATHE, BUT NOT THE OTHER STUFF (USED FOR BURNING)
PART THAT FALLS OFF THIRD (THIS PART FLEW AWAY FROM OUR WORLD INTO SPACE AND HIT THE WORLD WE WERE GOING TOWARD)
FIRE COMES OUT HERE
PART THAT FALLS OFF SECOND
MORE SKY BAG AIR (FOR BURNING) (COLD+WET)
MORE BREATHING-TYPE AIR (FOR BURNING) (COLD+WET)
THING THAT BRINGS IN COLD WET AIR TO BURN
FIRE COMES OUT HERE
MORE BREATHING-TYPE AIR (FOR BURNING) (COLD+WET)
MORE FUNNY VOICE AIR (FOR FILLING UP SPACE)
PART THAT FALLS OFF FIRST
OPENING FOR PUTTING IN COLD WET AIR
THIS IS FULL OF THAT STUFF THEY BURNED IN LIGHTS BEFORE HOUSES HAD POWER.
IT GOES TOGETHER WITH THE COLD AIR WHEN IT'S TIME TO START GOING UP.
LOTS OF FIRE COMES OUT HERE

Figure 7.4.2 *A description of the blueprints for NASA's Saturn Five rocket using only the 1000 most commonly-used English words* [2]

Compare the description in **Figure 7.4.2** to the information given on the NASA website about the Mars Curiosity Rover.

Note the differences in the level of detail, vocabulary, and overall purpose of the descriptions. If you used the information on the NASA site to fill in the **Technical Description Template**, you might end up with something like the following chart.

Template for Description of Mars Curiosity Rover

Definition	Curiosity Rover – a NASA robot designed to explore Mars
Function	Travels around the Gale Crater on Mars, collecting data to send back to Earth. Its mission is to see if Mars could ever have supported life, and if humans could survive there someday
Overview	Car-sized, 6 wheel robot, about 7' tall, with a roughly square chassis that has several appendages connected to it that house sensors of various types
Components	• Main body protects the computer, electronics and instrument systems • "Neck and head" like a mast coming out of the centre of the chassis, this houses many of the rover's cameras • Six legs – "rocker bogie" design – wide apart, allows all wheels to remain on uneven terrain • Arm – roughly 7 ' long, (with "shoulder, elbow and wrist" joints), with a "hand" at the end, extends out of the front of the chassis. This contains many tools for drilling, collecting samples, etc. • "Tail" – contains radio-isotopic power source that powers the rover
Visuals	• Overall view (front and side? Top view?) • View of arm with labeled components • View of head and neck with labeled components
Conclusion/Supplemental	Information about lifespan? Travel speed? Energy use?
References	NASA website – Mars Curiosity Rover page

You may find that some of these elements are not necessary; again, consider what your target audience already knows. Strike a balance between unnecessarily stating the obvious and incorrectly assuming your readers have knowledge that they may lack.

In refining the details of your description and its component parts, consider the following:

- **Organization**: Determine the most logical principle to organize your description
    - Steps in a process it completes
    - Top to bottom (or foundation upward)
    - Left to right (or right to left)
    - Inside to outside (or outside to inside)

2. R. Munroe, "Up Goer Five" [Online]. Available: https://xkcd.com/1133/ Also see "1133 Up Goer Five - explained," *Explain xkcd wiki* [Online]. Available: https://www.explainxkcd.com/wiki/index.php/1133:_Up_Goer_Five . CC-BY-NC 2.5.

    - Most important to least important features
    - Central component to peripherals
    - Material properties, *etc*.
- **Language:** Use specific, precise, concrete terms – avoid vague or overly-general terms
    - Use correct terminology – define terms as necessary for your audience
    - Use analogy to describe an unfamiliar thing in terms of a familiar thing
    - Use objective language – no "ad speak" or subjective terms
    - Use present tense, active verbs to describe how the device appears and what it does
    - Use words that create vivid and specific pictures in the reader's mind.

EXERCISE 7.2 Practice technical description

Choose a common, everyday object (such as one of the objects in **Figure 7.4.3**) and draft a technical description for an audience unfamiliar with the object. Start by imagining a target audience and purpose, and then try filling in the Technical Description Template with detailed information. Using the information in your template, draft a short description of 1-2 paragraphs, and add properly-captioned visuals.

Figure 7.4.3 *Common objects for practice description.*[3]

3. [Corkscrew and bicycle images]. [Online]. Available: https://www.flickr.com/photos/dogbomb/527733767 and https://www.flickr.com/photos/8205548@N08/4607907389. CC BY 2.0.

9.4 LONG REPORTS – RECOMMENDATION REPORTS AND FEASIBILITY STUDIES

SUZAN LAST

Long reports, such as Feasibility and Recommendation Reports, are most often the final step in a series of documents, often beginning with a **Proposal** and perhaps following a series of **Progress Reports**. The reports in this rather loosely defined category are variously called feasibility reports, recommendation reports, evaluation reports, assessment reports, *etc*. They all do roughly the same thing—provide a careful study of a situation or problem, and often recommend what should be done to improve the situation. There are some subtle differences among these types, and names for them can vary.

FEASIBILITY REPORTS

A feasibility report studies a situation (for example, a problem or opportunity) and a plan for doing something about it, and then determines whether that plan is "feasible"—whether it is practical in terms of current technology, economics, time frame, social needs and preferences, and so on. The feasibility report answers the question "Should we implement Plan X?" by stating "yes," "no," or sometimes a "maybe" or "under certain conditions." Not only does it indicate whether the idea is feasible, it also provides the data and the reasoning behind that determination; conversely, it might outline the reasons why the idea cannot or should not be implemented, or what obstacles must be overcome before the idea can become feasible. Typical questions addressed in these reports include

- ***Is it possible?*** Can this be done within the allotted budget, time frame, legal and regulatory conditions, and technical capabilities?
- ***Is it financially viable?*** Even if it falls within our budget, *should* we do it? Will it have long term benefits that outweigh costs? Is there a less expensive or financially risky way to achieving the same result? How does it compare to the cost of doing nothing about this situation?
- ***Will it be accepted by the community?*** Will people be in favor of this idea? Will anyone be opposed to it? How much public support is necessary to make this successful? (What kind of stakeholder consultation might be necessary to determine this?)

RECOMMENDATION REPORTS

A recommendation reports starts from a stated need; it offers a selection of solution options, presents a detailed comparative analysis of the options, and then recommends one, some, or none. For example, a company might be looking at grammar-checking software and want a recommendation on which product is the best fit for them. As the report writer on this project, you could study the market for this type of application and recommend one particular product, 2-3 possible products (differing perhaps in their strengths and their weaknesses), or none (maybe none of them are appropriate for the client's specific needs). The recommendation report answers the question "Which option should we choose, and why?" (or in some cases "Which are the best options?) by recommending Product B, or maybe both Products B and C, or none of the products. These recommendations might arise from questions such as

- What should we do about Problem X?
- What is the best way to provide Function or Service A?
- Should we use Technology X or Technology Y to perform Function Z?

EVALUATION REPORTS

An evaluation report provides a judgment or assessment rather than a yes-no-maybe answer or a recommendation. It provides a studied opinion on the *value* or *worth* of something. For example, for over a year the city of Austin had free bus transportation in an attempt to increase ridership and reduce automobile traffic. Did it work? Was it worthwhile?—These are questions an evaluation report would attempt to answer. This type of report compares a thing to a set of requirements (or criteria) and determines how well it meets those requirements. (And of course, this may result in a recommendation: to continue the project, scrap it, change it, or other possibilities.)

As you can see, these distinctions are rather fine, and they overlap somewhat. In real-world writing, these types often combine; you might see elements of the recommendation report combine with the feasibility report, for example.

TYPICAL CONTENTS OF RECOMMENDATION AND FEASIBILITY REPORTS

Whatever variety of feasibility or recommendation report you write, whatever name people call it—most of the sections and the organization of those sections are roughly the same.

The structural principle fundamental to this type of report is this: you provide not only your recommendation, choice, or judgment, but also the data, analysis, discussion, and the conclusions leading to it. That way, readers can check your findings, your logic, and your conclusions to make sure your methodology was sound and that they can agree with your recommendation. Your goal is to convince the reader to agree with you by using your careful research, detailed analysis, rhetorical style, and documentation. Since your reader will want to make an evidence-based decision, it is critical that all of your claims and recommendations are supported by sound research and evidence.

The general problem-solving approach for a Recommendation Report entails the steps shown in the example below.

Typical Recommendation Report Elements

1. Identify the **need**	What is the “unsatisfactory situation” that needs to be improved?
2. Identify the **criteria** for responding to the need	What is the overall goal? What are the specific, measurable objectives any solution should achieve? What constraints must any solution adhere to?
3. Determine the solution **options** you will examine	Define the scope of your approach to the problem. Identify the possible courses of action that you will examine in your report. You might include the consequences of simply doing nothing.
4. Study how well each **option** meets the **criteria**	Systematically study each option, and compare how well they meet each of the objectives you have set. Provide a systematic and quantifiable way to compare how well to solution options meet the objectives (weighted objectives chart).
5. Draw **conclusions** based on your analysis	Based on the research presented in your discussion section, sum up your findings and give a comparative evaluation of how well each of the options meets the criteria and addresses the need.
6. Formulate **recommendations** based on your conclusion	Indicate which course of action the reader should take to address the problem, based on your analysis of the data presented in the report.

These steps generally coincide with how you will organize your information. Your report will be divided into several sections that will likely include most or all of the following elements:

1. **INTRODUCTION:** the introduction should clearly indicate the document’s purpose. Your introduction will discuss the “unsatisfactory situation” that has given rise to this report, and the requirements that must be met (the **Problem Definition**). Your reader may also need some background. Finally, provide an overview of the contents of the report.
2. **TECHNICAL BACKGROUND:** some recommendation or feasibility reports may require technical discussion in order to make the rest of the report meaningful. The dilemma with this kind of information is whether to put it in a section of its own or to fit it into the comparison sections where it is relevant. For example, a discussion of power and speed of tablet computers is going to necessitate some discussion of RAM, megahertz, and processors. Should you put that in a section that compares the tablets according to power and speed? Should you keep the comparison neat and clean, limited strictly to the comparison and the conclusion? Maybe all the technical background can be pitched in its own section—either toward the front of the report or in an appendix.
3. **REQUIREMENTS AND CRITERIA**: a critical part of feasibility and recommendation reports is the discussion of the requirements (objectives and constraints) you’ll use to reach the final decision or recommendation. Here are some examples:
    - If you’re trying to recommend a tablet computer for use by employees, your requirements are likely to involve size, cost, hard-disk storage, display quality, durability, and battery function.
    - If you’re looking into the feasibility of providing every student at Austin Community

College with an ID on the ACC computer network, you'd need define the basic requirements of such a program—what it would be expected to accomplish, problems that it would have to avoid, and so on.

- If you're evaluating the recent program of free bus transportation in Austin, you'd need to know what was expected of the program and then compare its actual results to those requirements.

Requirements can be defined in several ways:

Numerical Values: many requirements are stated as maximum or minimum numerical values. For example, there may be a cost requirement—the tablet should cost no more than $900.

Yes/no Values: some requirements are simply a yes-no question. Does the tablet come equipped with Bluetooth? Is the car equipped with voice recognition?

Ratings Values: in some cases, key considerations cannot be handled either with numerical values or yes/no values. For example, your organization might want a tablet that has an ease-of-use rating of at least "good" by some nationally accepted ratings group. Or you may have to assign ratings yourself.

The requirements section should also discuss how important the individual requirements are in relation to each other. Picture the typical situation where no one option is best in all categories of comparison. One option is cheaper; another has more functions; one has better ease-of-use ratings; another is known to be more durable. Set up your requirements so that they dictate a "winner" from situation where there is no obvious winner. A "weighted objectives chart" or "Decision Matrix" is often used in these cases.

4. **DISCUSSION OF SOLUTION OPTIONS:** In certain kinds of feasibility or recommendation reports, you'll need to explain how you narrowed the field of choices down to the ones your report focuses on. Often, this follows right after the discussion of the requirements. Your basic requirements may well narrow the field down for you. But there may be other considerations that disqualify other options—explain these as well.

   Additionally, you may need to provide brief **technical descriptions** of the options themselves. Don't confuse this with the comparison that comes up in the next section. In this description section, you provide a general discussion of the options so that readers will know something about them. The discussion at this stage is not comparative. It's just a general orientation to the options presented in an objective way. In the tablets example, you might want to give some brief, general specifications on each model about to be compared.
5. **COMPARATIVE ANALYSIS:** one of the most important parts of a feasibility or recommendation report is the comparison of the options. Remember that you include this section so that readers can follow the logic of your analysis and come up with different conclusions if they desire. This comparison can be structured using a "block" (whole-to-whole) approach, or an "alternating" (point-by-point) approach.

Block Approach	Alternating (Point-by-Point) Approach
All the information about Option 1	Compare all Options according to Criteria A (cost)
All the information about Option 2	Compare all Options according to Criteria B (functionality)
All the information about Option 3	Compare all options according to Criteria C (ease of use)
Direct Comparative Analysis of all three options and Summary of Results	Summary of Results

You might compare 3 solution options (1, 2, and 3) using three criteria for comparison (A, B, and C). If you were comparing tablets, you'd likely use the point-by-point approach, having a section that compared all three options based on cost (criteria A), another section that compared them on battery function, and so on. You *wouldn't* have a section that discussed everything about option 1, another that discussed everything about option 2, and so on. That would not be effective or efficient, because you still have to make direct comparisons somewhere near the end of your discussion (such as in a weighted objectives chart).

Each of these comparative sections should end with a conclusion that sums up the relative strengths and weaknesses of each option and indicates which option is the best choice in that particular category of comparison. Of course, it won't always be easy to state a clear winner—you may have to qualify the conclusions in various ways, providing multiple conclusions for different conditions.

If you were writing an evaluation report, you wouldn't be comparing options. Instead, you'd be comparing the thing being evaluated against the requirements placed upon it and the expectations people had of it. For example, Capital Metro had a program of more than a year of free bus transportation. What was expected of that program? Did the program meet those expectations?

6. **SUMMARY TABLE:** after the individual comparisons, include a summary table (such as a **Weighted Objectives Chart** explained below) that summarizes the conclusions from the comparative analysis section. Some readers are more likely to pay attention to details in a table than in paragraphs; however, you still have to write up a clear summary paragraph of your findings.
7. **CONCLUSIONS:** the conclusions section of a feasibility or recommendation report amalgamates all of the conclusions you have already reached in each of the comparison sections. In this section, you restate the individual conclusions, for example, which model had the best price, which had the best battery function, and so on. You could give a summary of the relative strengths and weakness of each option based on how well they meet the criteria.

   This section has to go further. It must untangle all the conflicting conclusions and somehow reach the final conclusion, which is the one that states which is the best choice. Thus, the conclusion section first lists the *primary conclusions*—the simple, single-category ones. Then it must state *secondary conclusions*—the ones that balance conflicting primary conclusions. For example, if one tablet is the least inexpensive but has poor battery function, but another is the most expensive but has good battery function, which do you choose and why? The secondary conclusion would state the answer to this dilemma.
8. **RECOMMENDATIONS:** the final section of feasibility and recommendation reports states the recommendations which flow directly from your conclusions and directly address the problem outlined in the introduction. These may sometimes be repetitive, but remember that some

readers may skip right to the recommendation section. Also, there will be some cases where there may be a best choice but you wouldn't want to recommend it. Early in their history, laptop computers were heavy and unreliable—there may have been one model that was better than the rest, but even it was not worth having. You may want to recommend further research, a pilot project, or a re-design of one of the options discussed.

The recommendation section should outline what further work needs to be done, based solidly on the information presented previously in the report and responding directly to the needs outlined in the beginning. In some cases, you may need to recommend several ranked options based on different possibilities.

WEIGHTED OBJECTIVES CHARTS

When comparing alternative solutions to see which one best meets the design criteria, you will often use a Weighted Objectives Chart (WOC) or a decision matrix of some kind. In order to evaluate the solution alternatives fairly and in an unbiased way, it is important to devise a way of evaluating the designs *before* they are created, or before you finalize those design alternatives. The criteria that go into a WOC should be based directly on the objectives you defined in your problem definition, and may include additional objectives that will help you measure the effectiveness and desirability of each solution alternative. Then, you build or chose the design alternatives to best fit these criteria.

Creating a weighted objectives chart entails several detailed steps:

1. Determine the objectives you will use to evaluate the design alternatives (base these on the objectives stated in your problem definition). Aim for at least 5 objectives to create a robust set of evaluation criteria
2. Place the objectives in order from most to least important
3. Assign each objective a weight, giving the most important objective the highest weight, and the least important objective receiving the lowest. The combined weights of all objectives should sum to a unity (1, 10, or 100).
4. Create a scoring rubric for each objective, showing how you will assign a "grade" for how well each design meets that criteria. This is usually done using a Likert scale (scale of 1-5 or 1-10), with each value having a specific value or range of values. You will need to determine how you will measure and grade achievement of each objective. These can be quantitative (miles per gallon of fuel consumption) or qualitative (subjective experience of comfort), as seen in the scoring rubric sample below.

Points	Cost (CND$)	Fuel consumption (m/g)	Comfort level
0	over max budget of $5000	less than 27	very uncomfortable
1	4501 – 5000	27-29	poor comfort level
2	4001 – 4500	30-32	below average comfort
3	3501 – 4000	33-36	average comfort
4	3001 – 3500	37-40	above average comfort
5	3000 or less	more than 40	extremely comfortable

Once you have determined your objectives, ranked and weighted them, and created scoring rubrics for each one, you can place them all in a table that allows you to easily compare each solution. See **Table 7.5.1** for a sample Weighted Objectives Table designed to compare several car purchase options. In the magnitude column, you would enter the actual price, fuel consumption, etc. Under score, enter the score that the magnitude gets in the objective scoring rubric (seen above). To get the "value," multiply your score by the weight. Adding all the values for each option will give you the overall utility value for each option, and show you which one best meets your objectives.

Table 7.5.1 Sample Weighted Objectives table for comparing two car purchase options

Objective	Weight	Measurement	Car A			Car B		
			magnitude	score	value	magnitude	score	value
Cost	30	price range	4299	2	60			
Fuel consumption	25	miles per gallon						
Cost of parts	20	average cost						
Ease of maintenance	15	ease of servicing						
Comfort	10	comfort rating						
Overall utility value								

Note that the objectives are listed in order from highest to lowest weighted, and all the weights add up to 100. Therefore, if one possible purchase option had a sale price of $4299, you would enter that under the "magnitude;" that would receive a score of 2, based on the scoring rubric; multiply 2 by the weight of 30, and the overall score for that objective is 60.

You can download a fully formatted, blank WOC template in Word here: [Weighted Objectives Chart Template]

REVISION CHECKLIST FOR RECOMMENDATION REPORTS

As you reread and revise your recommendation report, ensure that you have included all of the sections and elements described below.

Revision Checklist for Recommendation Reports

Document Section	Key Content Elements	Check
Introductory Sections	Indicate the situation and the audience.	
	Discuss the background of the problem or opportunity—what brought about the need for the report? Give technical background if necessary.	
	State requirements—those factors that influence the decision on the choice of options (objectives and constraints).	
	Indicate how the field of options was narrowed to the ones being compared (if relevant).	
	Provide an overview of the contents.	
Discussion Sections	Organize the comparative analysis/discussion of the options using the point-by-point or whole-to-whole approach. Choose the structure that best matches your content and purpose.	
	At the end of each comparative section, state the best choice in terms that point of comparison.	
	Include a summary table, if possible, in which you summarize all the key data in table form.	
Conclusion	Restate all the key conclusions from the Discussion sections.	
	State secondary conclusions, and based them on requirements established at the beginning.	
	State a final conclusion (about the overall feasibility of the idea or about the overall strengths and weaknesses of each option compared).	
Recommendations	Make recommendations for future actions; reiterate how these actions will provide the sought-after benefits outlined in the introduction.	
References	Fully document any sources used in the report.	
Appendices	Add any additional information that has been referred to, but not included in the body of the report.	

9.5 WRITING INSTRUCTIONS

SUZAN LAST

One of the most common and important uses of technical writing is to provide instructions, those step-by-step explanations of how to assemble, operate, repair, or do routine maintenance on something. Although they may seems intuitive and simple to write, instructions are some of the worst-written documents you can find. Most of us have probably had many infuriating experiences with badly written instructions. This chapter will show you what professionals consider the best techniques in providing instructions.

An effective set of instruction requires the following:

- Clear, precise, and simple writing
- A thorough understanding of the procedure in all its technical detail
- The ability to put yourself in the place of the reader, the person trying to use your instructions
- The ability to visualize the procedure in detail and to capture that awareness on paper
- Willingness to test your instructions on the kind of person you wrote them for.

PRELIMINARY STEPS

At the beginning of a project to write a set of instructions, it is important to determine the structure or characteristics of the particular procedure you are going to write about. Here are some steps to follow:

1. Do a careful audience and task analysis

Early in the process, define the audience and situation of your instructions. Remember that defining an audience means defining the level of familiarity your readers have with the topic.

2. Determine the number of tasks

How many tasks are there in the procedure you are writing about? Let's use the term *procedure* to refer to the whole set of activities your instructions are intended to discuss. A *task* is a semi-independent group of actions within the procedure: for example, setting the clock on a microwave oven is one task in the big overall procedure of operating a microwave oven.

A simple procedure like changing the oil in a car contains only one task; there are no semi-independent groupings of activities. A more complex procedure like using a microwave oven contains several semi-independent tasks: setting the clock; setting the power level; using the timer; cleaning and maintaining the microwave, among others.

Some instructions have only a single task, but have many steps within that single task. For example, imagine a set of instructions for assembling a kids' swing set. In my own experience, there were more than a 130 steps! That can be a bit daunting. A good approach is to group similar and related steps into phases, and start renumbering the steps at each new phase. A *phase* then is a group of similar steps within a single-task procedure. In the swing-set example, setting up the frame would be a phase; anchoring the thing in the ground would be another; assembling the box swing would be still another.

3. Determine the best approach to the step-by-step discussion

For most instructions, you can focus on tasks, or you can focus on tools (or features of tools). In a *task approach* (also known as task orientation) to instructions on using a phone-answering service, you'd have these sections:

- Recording your greeting
- Playing back your messages
- Saving your messages
- Forwarding your messages
- Deleting your messages, and so on

These are tasks—the typical things we'd want to do with the machine.

On the other hand, in a *tools approach* to instructions on using a photocopier, there likely would be sections on how to use specific features:

- Copy button
- Cancel button
- Enlarge/reduce button
- Collate/staple button
- Copy-size button, and so on

If you designed a set of instructions on this plan, you'd write steps for using each button or feature of the photocopier. Instructions using this tools approach are hard to make work. Sometimes, the name of the button doesn't quite match the task it is associated with; sometimes you have to use more than just the one button to accomplish the task. Still, there can be times when the tools/feature approach may be preferable.

4. Design groupings of tasks

Listing tasks may not be all that you need to do. There may be so many tasks that you must group them so that readers can find individual ones more easily. For example, the following are common task groupings in instructions:

1. Unpacking and setup tasks

2. Installing and customizing tasks
3. Basic operating tasks
4. Routine maintenance tasks
5. Troubleshooting tasks.

COMMON SECTIONS IN INSTRUCTIONS

The following is a review of the sections you'll commonly find in instructions. Don't assume that each one of them *must* be in the actual instructions you write, nor that they have to be in the order presented here, nor that these are the only sections possible in a set of instructions.

For alternative formats, check out the example instructions.

A Set of Instructions Often Includes the Following

Introduction: plan the introduction to your instructions carefully. It might include any of the following (but not necessarily in this order):

- Indicate the specific tasks or procedure to be explained as well as the scope (what will and will not be covered)
- Indicate what the audience needs in terms of knowledge and background to understand the instructions
- Give a general idea of the procedure and what it accomplishes
- Indicate the conditions when these instructions should (or should not) be used
- Give an overview of the contents of the instructions.

General warning, caution, danger notices: instructions often must alert readers to the possibility of ruining their equipment, screwing up the procedure, and hurting themselves. Also, instructions must often emphasize key points or exceptions. For these situations, you use special notices—note, warning, caution, and danger notices. Notice how these special notices are used in the example instructions listed above.

Technical background or theory: at the beginning of certain kinds of instructions (after the introduction), you may need a discussion of background related to the procedure. For certain instructions, this background is critical—otherwise, the steps in the procedure make no sense. For example, you may have had some experience with those software applets in which you define your own colors by nudging red, green, and blue slider bars around. To really understand what you're doing, you need to have some background on color. Similarly, you can imagine that, for certain instructions using cameras, some theory might be needed as well.

Equipment and supplies: notice that most instructions include a list of the things you need to gather before you start the procedure. This includes *equipment*, the tools you use in the procedure (such as mixing bowls, spoons, bread pans, hammers, drills, and saws) and *supplies*, the things that are consumed in the procedure (such as wood, paint, oil, flour, and nails). In instructions, these typically are listed either in a simple vertical list or in a two-column list. Use the two-column list if you need to add some specifications to some or all of the items—for example, brand names, sizes, amounts, types, model numbers, and so on.

Discussion of the steps: when you get to the actual writing of the steps, there are several things to keep in mind: (1) the structure and format of those steps, (2) supplementary information that might be needed, and (3) the point of view and general writing style.

Structure and format: normally, we imagine a set of instructions as being formatted as vertical numbered lists. And most are in fact. Normally, you format your actual step-by-step instructions this way. There are some variations, however, as well as some other considerations:

- ***Fixed-order steps*** are steps that must be performed in the order presented. For example, if you are changing the oil in a car, draining the oil is a step that *must* come before putting the new oil. These are numbered lists (usually, vertical numbered lists).
- ***Variable-order steps*** are steps that can be performed in practically any order. Good examples are those troubleshooting guides that tell you to check this, check that where you are trying to fix something. You can do these kinds of steps in practically any order. With this type, the bulleted list is the appropriate format.
- ***Alternate steps*** are those in which two or more ways to accomplish the same thing are presented. Alternate steps are also used when various conditions might exist. Use bulleted lists with this type, with OR inserted between the alternatives, or the lead-in indicating that alternatives are about to be presented.
- ***Nested steps*** may be used in cases when individual steps within a procedure are rather complex in their own right and need to be broken down into sub-steps. In this case, you indent further and sequence the sub-steps as a, b, c, and so on.
- ***"Step-less" instructions***. can be used when you really cannot use numbered vertical list or provide straightforward instructional-style directing of the reader. Some situations must be so generalized or so variable that steps cannot be stated.

Supplementary discussion: often, it is not enough simply to tell readers to do this or to do that. They need additional explanatory information such as how the thing should look before and after the step; why they should care about doing this step; what mechanical principle is behind what they are doing; even more micro-level explanation of the step—discussion of the specific actions that make up the step.

The problem with supplementary discussion, however, is that it can hide the actual step. You want the actual step—the specific actions the reader is to take—to stand out. You don't want it all buried in a heap of words. There are at least two techniques to avoid this problem: you can split the instruction from the supplement into separate paragraphs; or you can bold the instruction.

WRITING STYLE

Placing the key user steps in **bold** can a very helpful way to signal clearly what the reader needs to do. Often the command verb is bolded; sometimes bold font highlights the key component being discussed.

Use of the **passive voice** in instructions can be problematic. For some strange reason, some instructions sound like this: "The **Pause** button should be depressed in order to stop the display temporarily." Not only are we worried about the pause button's mental health, but we wonder who's supposed to depress the thing (*ninjas*?). It would be more helpful to indicate when the reader must "**press** the Pause button." Consider this example: "The Timer button is then set to 3:00." Again, one might ask, "is set by whom? *Ninjas*?" The person following these instructions might think it is simply a reference to some existing state, or she might wonder, "Are they talking to me?" Using the third person can also lead to awkwardness: "The user should then press the Pause button." Instructions should typically be written using command verb forms and using "you" to make it perfectly clear what the reader should do.

ILLUSTRATING YOUR INSTRUCTIONS

Perhaps more than in any other form of technical writing, graphics are crucial to instructions. Sometimes, words simply cannot explain the step. Illustrations are often critical to the readers' ability to visualize what they are supposed to do. Be sure that the graphics represent the image from the reader's perspective.

FORMATTING YOUR INSTRUCTIONS

Since people rarely *want* to read instructions, but often *have* to, format your instructions for reluctant readability. Try to make your reader *want* to read them, or at least not *resistant* to the idea of consulting them. Highly readable format will allow readers who have figured out some of the instructions on their own to skip to the section where they are stuck. Use what you have learned about headings, lists, visuals, and passive space to create effective and readable instructions:

Headings: normally, you'd want headings for any background section you might have, the equipment and supplies section, a general heading for the actual instructions section, and subheadings for the individual tasks or phases within that section.

Lists: similarly, instructions typically make extensive use of lists, particularly numbered vertical lists for the actual step-by-step explanations. Simple vertical lists or two-column lists are usually good for the equipment and supplies section. In-sentence lists are good whenever you give an overview of things to come.

Special Notices: you may have to alert readers to possibilities in which they may damage their equipment, waste supplies, cause the entire procedure to fail, injure themselves or others—even seriously or fatally. Companies have been sued for lack of these special notices, for poorly written special notices, or for special notices that were out of place. See special notices for a complete discussion of the proper use of these special notices as well as their format and placement within instructions.

Revision Checklist for Written Instructions

As you reread and revise your instructions, check that they do the following:

- Clearly describe the exact procedure to be explained
- Provide an overview of content
- Indicate audience requirements
- Use various types of lists wherever appropriate; in particular, use numbered lists for sequential steps
- Use headings and subheadings to divide the main sections and subsections in a logical, coherent order
- Use special notices as appropriate
- Use graphics to illustrate key actions and objects

- Provide additional supplementary explanation of the steps as necessary
- Create a section listing equipment and supplies if necessary.

CHAPTER 10 REPORTS

INTRODUCTION

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.

Before delving into reports in detail, let's review the advantages, disadvantages, and occasions for writing them .

TABLE 22.1 EXCERPT: REPORT PROS, CONS, AND PROPER USE

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Report	• Allows presentation of a high volume of information presenting research and analysis • Can take various forms such as a document booklet or proposal for reading alone	• Time-consuming to write with proper research documentation and visual content • Time-consuming for the busy professional to read or an audience to take in	• Follow conventions for organizing information according to the size of the report, audience, and purpose • Visual aids should be covered in the text	• 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)

Report Writing Video[1]

1. University of South Australia. (2017). Study Help: Report writing [Video file]. Retrieved from https://www.youtube.com/watch?v=GV4yMF8vx6o

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10.1 REPORT OBJECTIVE: INFORMATIONAL AND ANALYTICAL

LEARNING OBJECTIVES

After reviewing this information, you will be able to

- understand the purpose of analytical reports
- understand the purpose of informational reports

INTRODUCTION

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 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.

Informational reports provide facts, data, feedback, and other types of information to assist management to make decisions. Informational reports do not provide an analysis or interpretation of information and do not provide recommendations. 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.

Analytical reports provide facts, data, feedback and other types of information, but they also provide analysis, interpretation, and 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. Figure 22.1 below includes common reports that, depending on the audience's needs, maybe informational or analytical.

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Informational	Analytical
Characteristics ✓ Provides facts, data, feedback and other types of information ✗ Does not analyze or interpret information ✗ Does not provide recommendations	Characteristics ✓ Provides facts, data, feedback and other types of information ✓ Does analyze and interpret information ✓ Does provide recommendations

Figure 10.1.1 notes important similarities and differences between informational and analytical reports.

Report Writing[1]

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ANALYTICAL AND INFORMATION REPORT PURPOSE

Each report purpose is best suited for specific types of reports. Figure 22.2 below provides an overview of the most appropriate business situations to use an informational or analytical report.

Figure 10.1.2 Informational and Analytical Reports

1. NPBComm2. (2018). Report writing. What is the type of report [Video]. Youtube. Retrived from https://www.youtube.com/watch?v=_eu9maTxHkg.

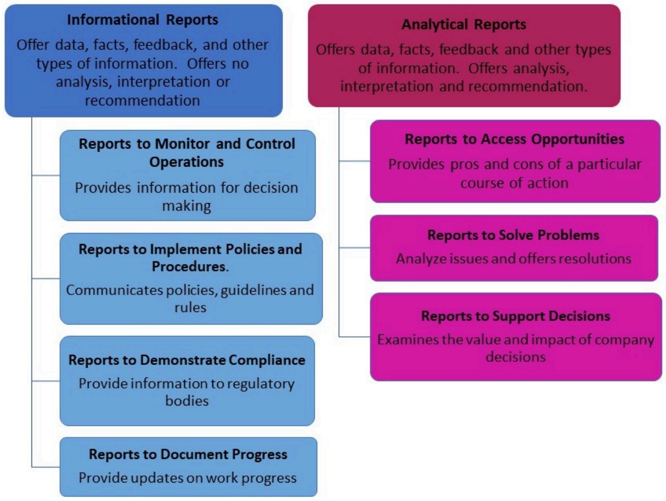

Figure 10.1.2 provides an overview of when to use informational and analytical reports to communicate your business messages

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Exercise

Select a Fortune 500 company that appeals to you and search recent tweets and Facebook posts about it. Write either an informational or analytical report about the company you chose. In an informational report, summarize your findings in memo form or as an email. Alternatively, you could write an analytical report analyzing the strategies the company adopts in responding to tweets and Facebook posts.

10.2 REPORT ORGANIZATION

Learning Objectives

After studying this unit, you will be able to

- understand how reports are organized

INTRODUCTION

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.

How to Write a Business Report Video[1]

1. USC. (2018). How to write a business report [Video]. Youtube. Retrieved from https://www.youtube.com/watch?v=V8uF1EoIneE&t=46s.

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https://pressbooks.nscc.ca/nscccommtrades/?p=248#h5p-131

ORGANIZATION PATTERN

Although reports have the same sections, the audience, purpose and content of a report will influence the report's organizing pattern: **direct or indirect.**

DIRECT PATTERN

Direct reports contain routine, nonsensitive information. Reports using this organizing pattern will present the most important findings first followed by facts, data and other explanatory details. Thus, the direct approach is most appropriate for **informational reports**. In addition, when the receiver is likely to be in agreement with and accepting of the report's information and recommendations, the direct approach can also be applied to **analytical reports.** This approach allows the receiver to access relevant information in a quick, efficient and easy to follow manner.

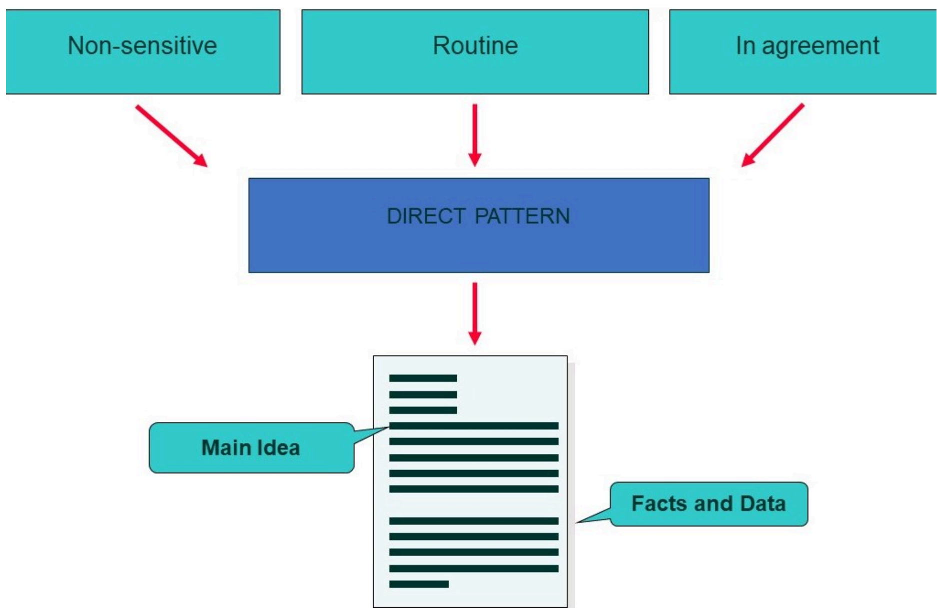

Figure 10.2.1 presents the organizing pattern of a direct report.

INDIRECT PATTERN

> A direct approach report presents the main idea followed by facts and findings

An indirect approach may contain sensitive, controversial, debated or unpleasant information. As a consequence, not all readers will be knowledgeable of, in agreement with, or accepting of the information and/or recommendations made in the report. For this reason, the indirect approach is used when the audience must be educated about or persuaded of the credibility of the information presented and the merits of the recommendations made. An indirect report presents the facts, data and other explanatory details before presenting its conclusions and recommendations. Since only analytical reports present recommendations, the indirect approach is used exclusively with **analytical reports**.

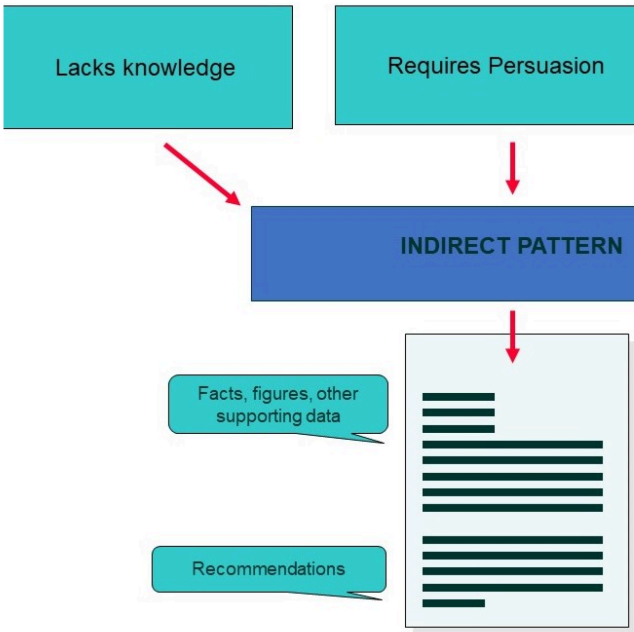

Figure 10.2.2 shows the organizing pattern of an indirect report.

ORDERING INFORMATION

An indirect approach report presents the facts and findings followed by the main idea.

In addition to determining if your report will use the direct or indirect approach, information must also be organized to help the reader understand the information. Five of the more useful ways to organize information are presented below.

Information Organization Methods

Time	Component	Importance	Criteria	Convention
Time organization is used to provide information in the order of events (e.g. what happened first, second, etc.). Using time to write trip reports and progress reports is particularly effective.	A component organizing system is used primarily for informational reports. Here elements such as location, geography, division, product or parts is used to present the data.	Reports organized according to importance my present the most important information first and then proceed to the least important information—or visa versa.	Reports organized via criteria establish standards or benchmarks to assess different options, plans, strategies, and products.	Reports created using a prescribed template are said to be organized using convention. Many short information reports use convention as their organizing principle.

Figure 10.2.5 presents five ways to organize information to assist reader comprehension.

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Exercise

Think of a problem or challenge you have observed or experienced at your workplace. Do you have an idea or a solution that would help to reduce costs, improve customer service, improve quality, etc? Before beginning, consider the organizational principles presented in this section to determine how best to organize your information to receive the best possible response from your boss. Now write the report.

10.3 REPORT TYPE AND FUNCTION: INFORMAL REPORT

Learning Objectives

After studying this unit, you will be able to

- identify different types of reports
- Identify the different functions of reports

INTRODUCTION

Depending on the complexity and depth of content, reports are categorized as either informal or formal. Whatever the type, all reports provide the information that people in an organization need to solve problems and make decisions.

The **informal report** is 10 pages or under, and for this reason, informal reports are also referred to as the **short report**. Informal reports can have both an internal and external audience, but are mostly written for an internal audience. For internal audiences, the informal report is constructed as a memo or email report; for the external audience, the informal report is constructed as a letter or email report.

> The informal report is the most routine of all reports and the type you will have to write most often

In addition, the informal report can be informational or analytical in nature. The informational report contains non-sensitive, routine information, often presented in a prescribed format such as a fill-in-the-blank form. For this reason, the sections of an informational report include the introduction, findings, and conclusion. In contrast, the short analytical report seeks to answer questions about specific problems with the aim of solving those problems. How can we use social media more effectively? Should we close or open a new plant? How can customer service be improved? Therefore, the short analytical report not only includes an introduction, findings, and conclusion, but also recommendations.

Table 10.3.3 Informational and Analytical Short Report Sections

Short Informational Reports

- Introduction
- Findings
- Conclusion

Short Analytical Reports

- Introduction
- Findings
- Conclusion
- Recommendation

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https://pressbooks.nscc.ca/nscccommtrades/?p=254#h5p-133

Informal Report Types and Functions

The video above provides a general overview of the short report. In your professional life, you will find that there are many different types of short reports to respond to the many different activities, duties, and responsibilities in business organizations. Table 10.3.2 below provides an overview of numerous types of short reports and their functions.

The order of the sections in an analytical report will depend on if you are writing a **direct** or **indirect** report

Table 10.3.4 Types and Function of Informal Reports

Informational Reports	Analytical Reports
Incident Report: Describes events in the workplace to officially document them for legal and insurance purposes	**Benchmark/Yardstick Report:** Evaluates two or more solutions to a single problem to determine the best solution.
Progress Report: Monitors and controls production, sales, shipping, service, or related business processes	**Feasibility Report:** Assesses the advisability of doing a project or proceeding with a specific course of action
Compliance Report: Documents and indicates the extent to which a product or service is within established compliance parameters or standards	**Recommendation Report:** Makes recommendations to management and serves as a tool to solve problems and make executive decisions
Financial Report: Analyzes status and trends from a finance perspective	
Investigative Report: Responds to a request for information about a specific problem or situation.	
Activity Report: Document the ongoing activities or projects of a division or department.	

Note: a review of the many different functions short informational and analytical reports serve in an organization

Labels and Section Headers

Although the informal report is short, any document that is two pages or longer should include a feature that helps to separate information into unique sections. Utilizing headers for any report in excess of 2-pages creates a better organized report and assists readers to understand, locate, and retain informatio.

Figure 10.3.4[1]

A QUICK COMPARISON: USING HEADINGS?

Take a look at these two dummy texts to compare the structure of an informal report without headings and an informal report that uses headings. (Note that these examples only show the formatting of a report, not the ideal way to write one.)

No Headings	Using Headings
General Store is opening a new location in Q4 of this upcoming year. There are three potential locations for this new store. In my research, I found that location one is in a poorly trafficked area, but is more affordable. Location two is in a highly trafficked area, but is out of the current budget. Location three is just right. After this research, I can conclude that General Store should open its new store at location three.	**Background** General Store is opening a new location in Q4 of this upcoming year. There are three potential locations for this new store. **Findings** Location one is in a poorly trafficked area, but is more affordable. Location two is in a highly trafficked area, but is out of the current budget. Location three is just right. **Recommendation** General Store should open its new store at location three.

Figure 10.3.4 illustrates the effectiveness of using headers to separate information. Notice how much easier it is to locate information via headers.

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https://pressbooks.nscc.ca/nscccommtrades/?p=254#h5p-134

Exercise

1. Select one of the following questions on which to base a report, and create an outline that contains functional and descriptive headings.

- Should online retailers compile customer profiles to help market their products?
- Do people over 40 suffer ageism in the IT industry?
- Can contemporary pop-up stores play a role in the marketing of new products?

1. Lumen (n.d.). Informal reports. Business communications skills for managers. Retrieved January 12, 2020 from https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/chapter/informal-reports/

2. Review a long business article in a journal or newspaper. Highlight examples of how the article uses headings, transitions, previews, and reviews to help readers find their way.

10.4 REPORT TYPE AND FUNCTION: FORMAL REPORT

Learning Objectives

After studying this unit, you will be able to

- understand the function of a formal report

INTRODUCTION

A formal report is a document that analyzes information, determines conclusions, and offers recommendations to solve problems. Formal reports are the result of the gathering and analysis of large amounts of data. This data is then presented to decision makers in business, industry, and government to aid in the process of making important decisions. Formal reports are longer (10+ pages) and are therefore also referred to as **long reports**. Long reports have a more formal tone, tackle complex and challenging topics, and are almost always analytical in nature. Similar to informal reports, formal reports are also organized into sections and utilize headings and subheadings to help readers access information. The following video provides and comprehensive overview of the long report.

Writing Long Reports[1]

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https://pressbooks.nscc.ca/nscccommtrades/?p=257#h5p-135

CONDUCTING RESEARCH

An informal report may be written without including any research. However, the same cannot be said of the formal report. Because of the scope and complexity of formal reports, there is a need for in-depth and extensive data research and analysis. Collecting research is a critical part of writing the formal report. The conclusions made and the recommendations that follow should be based on facts, statistics, expert knowledge and other forms of information. Thus, collecting credible, up-to-date, and reliable information is a critical part of writing a formal report. Given the easy access to research

1. GreggLearning. (2019). Writing long reports [Video]. Youtube. Retrieved from https://www.youtube.com/watch?v=szFDwdS-D8k

databases, the internet, and other sources of digitized information, collecting information is nearly effortless today.

Table 10.4.5 Types of Report Data

Form of Data	Questions to Ask
Background or historical	How much does my reader know? Has this topic/issue been investigated before? Are the sources current, relevant, and/or credible?
Statistical	What/who is the source? How recent is data? What is source of information?
Expert opinion	Who is the expert? Is information bias? Is the information published?
Individual or group opinion	Whose opinion will the reader value? Have surveys/interviews been conducted on topic? Would conducting a survey or questionnaire be useful? Would focus groups provide useful information?
Organizational	Is in-house data available? How can I learn about public and private companies?

Note: The table presents various types of data and the questions to ask to ensure the credibility and reliability of collected information .

Documentation

Whenever research based on other people's work is included in a report, credit must be given to that work. This is called documentation. Proper documentation adds credibility to the information presented in a report and protects the writer against charges of plagiarism. Famous historians, high-level journalists, politicians, and educators have suffered grave consequences for not providing the required documentation.

To add clarity to writing and avoid charges of plagiarism, document the following:

- another person's ideas, opinions, examples, or theory
- Any facts, statistics, graphs, and drawings that are not common knowledge
- Quotations or another person's actual spoken or written words

- Paraphrases of another person's spoken or written words
- Visuals, images, and any kind of electronic media

Exercise

1. Select five business articles from a combination of print and online resources. Using APA, develop a Reference list of those resources.
2. Select a professional journal for your field of study. Select an article that is at least five pages long, of interest to you, and provides information on emerging trends in your field. Write an executive summary of the article for a busy executive who does not have time to read the entire article but who needs to stay current on what is happening in your field of expertise.

10.5 REPORT PARTS – INFORMAL AND FORMAL

LEARNING OBJECTIVES

After studying this unit, you will be able to

- understand the parts of an informal report
- understand the parts of a formal report

INTRODUCTION

Informal reports differ from formal reports in their length, purpose, and content. Nonetheless, the parts of an informal and formal report can be divided into three components: **front matter**, the parts of a report that precede the main body and contain introductory and background information that provides the context for the remainder of the report; **body**, the presentation of facts, statistics, expert opinion and other forms of research that provide the basis for any decisions made; and **back matter**, the parts of a report that follow the main body and provides the credentials for the data presented and other supplemental information. Figure 22.5 organizes the parts of an informal and formal report into the three components.

PARTS OF INFORMAL AND FORMAL REPORTS

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To understand the function of each part of an informal and formal report consult Table 10.5.3. Here the function of each part as well as information on how to compose each part of an informal or formal report is provided.

Table 10.5.3 Common Formal Business Report Elements

Part	Function	Example
	Front Matter	
1. 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 (public.wsu.edu)
2. Cover	Title and image Gives the reader an 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. List of Illustrations	A list of figures and tables to help readers locate them. The list may be included as part of the TOC or as its own separate page.	Figure 1...............5 Figure 2...............7 Table 1.................3

7. Executive Summary	Presents an overview of the entire report for readers who may not have time to read the details of the full report.	Review the steps and an example of well and poorly developed executive summaries.
8. Abstract	Enables the reader to get a sense of the entire report at a glance to make quick decisions based on the findings	Learn the strategy for developing informative and descriptive abstracts.
7. Introduction	Introduces the topic of the report Establishes the context in which the report topic makes sense	Review these examples of how to write a Purpose Statement and an introduction.
	Body	
8. Findings	Most extensive part of the report that presents the facts, statistics and expert opinion included in report.	Use the links to find keys to writing the findings section, including information on integrating graphics, integrating research, and using headers.
9. Conclusion	Summarizes the key finding presented in the report	Review information and complete exercises on writing a conclusion.
10. Recommendation	Outlines specific action to be taken to address issues and problems.	Review the recommendation writing process.
	Back Matter	
9. References	List of sources referenced/ cited throughout the report	This online module on references provides vital information.

10. Appendix	Related supporting materials. May include specialized supplemental materials.	An overview of creating appendices.

Academic Peport: Overall Structure Video[1]

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An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=260#h5p-138

Exercise

1. You are writing an analytical report on the Canadian sales of your company's newest product (you can decide on the product). Of the following topics, identify what section of the report should include each topic. Briefly explain your decisions.

- Regional breakdown of sales across the country
- Date the product was released in the marketplace
- Sales figures from competitors selling the same products worldwide
- Prediction of how the Canadian economy will affect sales over the next six months
- Methods used to obtain those predictions
- Suggestions for how the company should proceed in the marketplace
- Actions that must be completed by year's end to ensure successful market presence

Resources

1. PolyU ELC. (2018). Academic report: Overall structure [video] . YouTube. Retrieved from https://www.youtube.com/watch?time_continue=7&v=gm9t6WYBSuI&feature=emb_logo

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Ashford University. (2019). APA in-text citation helper. *The writing center*. Retrieved January, 19, 2019, from https://content.bridgepointeducation.com/curriculum/file/9fce9d11-3298-48ef-ac77-12fe7d5c0577/1/In-Text%20Citation%20Helper%20A%20Guide%20to%20Making%20APA%20In-Text%20Citations.zip/story_html5.html

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University of Tasmania. (2018). Statement of purpose. *Accounting communication matters.* Retrieved January 19, 2020, from https://www.utas.edu.au/accounting-communication-matters/writing-an-essay-or-report/starting-to-write/statement-of-purpose

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WHO. (2011). Report conclusion. *Writing effectively for WHO.* Retrieved January 19, 2020, from http://colelearning.net/who/module3/page40.html

10.6 THE SLIDEDECK REPORT

Learning Objectives

After studying this unit, you will be able to

- understand the difference between a slide deck, presentation, and written report
- understand the importance of slide decks
- know the steps in the slide deck design process

INTRODUCTION

In the modern day business environment, reports are also delivered as digital documents called slide decks. **Slide decks** are digital reports that can be delivered via email or uploaded to an online site. Slide decks are a midway point between traditional presentations and written reports. Although a slide deck is a presentation, it is meant to be read by the receiver, not presented by the sender. A slide deck contains more text and fewer images than a typical presentation, but less text and more images than a written report. These characteristics make slide decks more inviting to read and easier to understand than written reports while providing more information than a typical presentation. For this reason, more and more professional fields are using slide decks to organize, summarize and present information on a wide range of business functions and trends.

Figure 10.6.1: Image of a slide deck report that combines reduced amounts of text and visuals to effectively communicate information

DESIGNING A SLIDE DECK

In the video below, a pioneer in the field of slide deck presentations, Nancy Duarte[1], provides some tips on designing slide decks.

Nancy Duarte: How to Create Better Visual Presentations Video[2]

> An interactive H5P element has been excluded from this version of the text. You can view it online here:
> https://pressbooks.nscc.ca/nscccommtrades/?p=265#h5p-139

Why Use Slide Decks

Slide decks have become popular in business for several good reasons.

Pre-meeting Document: Slide decks present information in a short, easy-to-read, accessible format. It's normal to provide information in advance to meeting attendees. The accessible characteristic of a slide deck allows everyone time to preview the issues and come to the meeting

1. Duarte. (n.d.) Slidedocs. *Resources*. Retrieved from https://www.duarte.com/slidedocs/
2. Stanford Graduate School of Business. (2014). Nancy Duarte: How to create better visual presentations [Video file]. Retrieved from https://www.youtube.com/watch?v=so9EJoQJc-0

ready to share their views and make decisions. Therefore, a slide deck serves as a pre-meeting document that informs participants of the important point

Independent Reading: A presentation requires a speaker to explain the information presented. However, a slide deck provides just enough information to clearly communicate the main ideas presented. Thus, a slide deck allows for independent reading and study at the receiver's pace, consequently allowing a degree of convenience normal presentations do not.

Informative Handout: Providing a handout after a meeting or presentation serves to reinforce the main messages presented. A slide deck can contain the traditional main point highlights, but it can also contain interactive elements, video, and web links so the audience is able to explore all aspects of the information.

Visual Impact: Visuals help us communicate information quickly to different audiences. Visuals have the capacity to make complex information accessible. Thus, the visual aspect of a slide deck ensures that a larger segment of our audience is more likely to understand our message.

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Steps in the Design Process

Choosing a Presentation Software Application

A slide deck is a presentation. Thus, different types of presentation software can be used to create your slide deck. Although the most popular presentation software maybe PowerPoint, other presentation software options such as Keynote, Google Slide, ClearSlide, and Prezi can also be used to create a slide deck presentation.

Choose a Slide Template

Your company may have preferred slide templates, but if not, choose a clean and simple slide template based on the colour palette and font of your brand. Visual consistency is the objective of the template. Each slide should feel connected by a singular feeling or theme. Keep things consistent by using a solid background colour or pattern and by using background images that have a similar colour palette. Templates can also reflect the type of organization and report. Figure 10.6.2 offers an example.

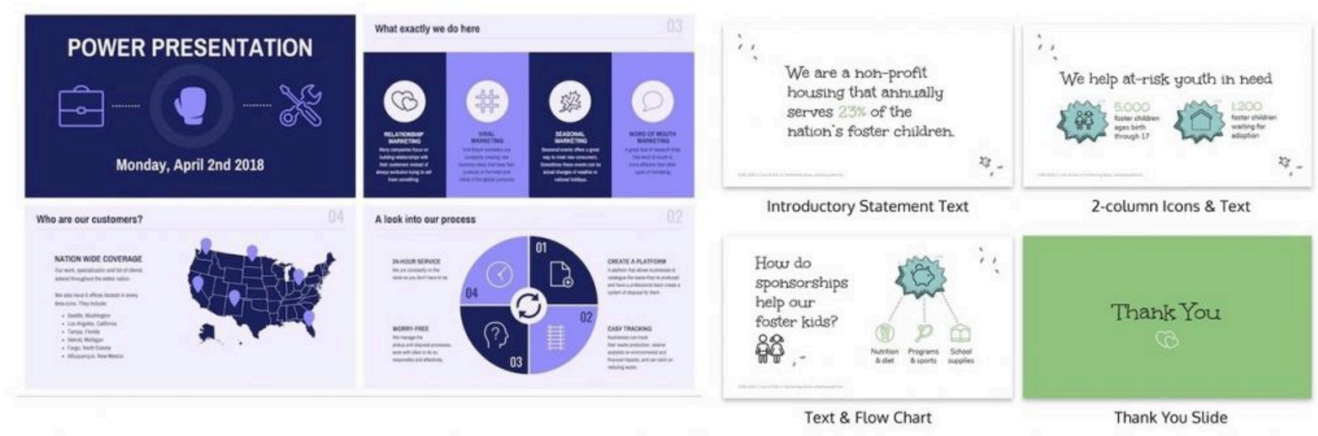

Figure 10.6.2: These two slide deck templates provide an example of consistency in colour, layout, and font, but the templates also reflect different types of reports and organizations.

Minimize Content

The business writing principles of short and concise writing apply to slide decks. When developing a slide deck, aim to present information in short, individual chunks of information. Avoid redundancy by only including points and visuals that are important for your audience to "see". Here are some other tips to ensure your content packs a punch.

- Sketch out your ideas on paper before using your presentation software to create your slide deck. Using a slide deck planning sheet can help you complete this step.
- Write the content and structure of the slide deck first then add supportive visuals
- Chunk your information by including only one main idea per slide
- Include one image per slide
- Use 18+ font size on each slide.
- Use only one-two different fonts
- For more complex information, use multiple slides
- Customize your slide deck to your specific audience

For additional information, view Cassie McDaniel's tutorial that features 22 tips for building great decks.

Design With Intention

Colour is one of the key ways that you can communicate visually, so it's important to be purposeful. Remember, no two people interpret the same symbols in the same way. It's your job to ensure your audience does not make unconscious connections in a way that will interfere with clear communication. Use colour to help your audience highlight an important concept or to focus attention on important information. For example, think about how and when to use your company's brand colours or the colours of a competitor to help communicate your message.

Use **visuals** that add value to the conversation. Use only one visual per slide, so choose a chart, graph, infographic, etc. that will help you communicate your main point via that illustration. Simple and easy-to-understand graphics are preferable to complex and complicated ones. Using simple illustrations will help you communicate clearly to your audience.

Figure 10.6.3: Seven simple steps to develop a slide deck

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https://pressbooks.nscc.ca/nscccommtrades/?p=265#h5p-141

THE DUARTE SLIDE DECK MANUAL

The Duarte Slide Deck Manual is the industry standard for the development of slide decks. Review this manual for comprehensive and in-depth information on how to create well-planned and designed slide decks. The information contained in the manual serves as a guide but also as an example of what businesses today expect from employees in the 21st century. The manual can be resized for easier viewing by using the enlarge option.

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Exercises 2.1

1. Review a report, proposal, or even an essay that you have previously written. Using the design principles covered in this section and presented in the Duarte Manual, convert that document into a slide deck report.

10. 7 KEY TAKEAWAYS

Key Takeaway

Reports require a clear purpose, solid organization, and adherence to conventions.

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

Access the documents below for additional information on report writing.

CHAPTER 11: PRESENTATIONS

OVERVIEW

Many surveys have shown that public speaking is at the top of the list of fears for most people — sometimes, higher 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.

11.1 PRESENTATIONS – AN OVERVIEW

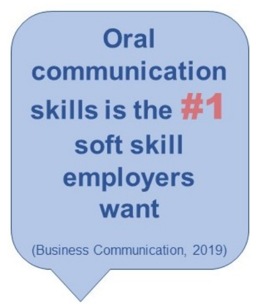
Learning Objectives

After studying this unit, you will be able to

- demonstrate how to plan a presentation
- understand how to construct the different parts of any presentation
- identify the use of different organizing principles for a presentation
- identify the different methods of speech delivery
- utilize specific techniques to enhance speech delivery

INTRODUCTION

At some point in your future careers, you will be called upon to give a presentation to your boss, colleagues, perhaps even customers. Although this may seem scary, it is also an opportunity to prove your knowledge and communication skills. Public speaking skills are important in a professional environment. In fact, public speaking skills are "the No. 1 predictor of success and upward mobility"[1] College and university is the perfect time to develop and perfect this skill. Knowing how to plan and execute a well-developed presentation in a face-to-face or virtual environment is a skill that will make your future employers take notice.



To get started, let's review the video below to gain an understanding of what is required to develop world-class and effective presentations.

1. (Business Communications, 2019, p. 431).

Five Simple Rules for Creating World Changing Presentations Video[2]

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https://pressbooks.nscc.ca/nscccommtrades/?p=210#h5p-92

PLANNING YOUR PRESENTATION

Planning a presentation is much like planning other business documents. There is importance to undertaking and applying a systematic process of planning, researching, drafting, and revising before delivering the final product. Completing this process can take a considerable amount of time. Figure 11.1.1 provides the planning process

Figure 11.1.1: A three-step process that will prepare you to deliver a flawless presentation.

Planning in any presentation is helpful both to you and to your audience. Your audience will appreciate receiving the information presented in an organized way, and being well organized will make the presentation much less stressful for you.

Successful presenters know their material, are prepared, do not read a script or PowerPoint presentation, do not memorize every single word in order (though some parts may be memorized), and do not make it up as you go along. Your presentation is scripted in the sense that it is completely planned from start to finish, yet every word is not explicitly planned, allowing for some spontaneity and adaptation to the audience's needs in the moment.

Your organization plan will serve you and your audience as a guide, and help you present a more effective speech. Just as there is no substitute for practice and preparation, there is no substitute for planning.

Knowing the Purpose

Speeches have traditionally been seen to have one of three broad purposes: to inform, to persuade,

2. Duarte, Inc. (n.d.). Five simple rules for creating world changing presentations [Video file]. Retrieved from https://www.youtube.com/watch?v=hT9GGmundag&t=1s

and — well, to be honest, different words are used for the third kind of speech purpose: to inspire, to amuse, to please, or to entertain. These broad goals are commonly known as a speech's general purpose, since, in general, you are trying to inform, persuade, or entertain your audience without regard to specifically what the topic will be. Perhaps you could think of them as appealing to the understanding of the audience (informative), the will or action (persuasive), and the emotion or pleasure.

Before getting into the specifics of how to create a purpose statement for a presentation, the following video provides an overview of the process.

Speech Purpose & Central Idea Video[3]

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https://pressbooks.nscc.ca/nscccommtrades/?p=210#h5p-93

Now that you know your general purpose (to inform, to persuade, or to entertain), you can start to move in the direction of the specific purpose. A specific purpose statement builds on your general purpose (to inform) and makes it more specific (as the name suggests). So if your first speech is an informative speech, your general purpose will be to inform your audience about a very specific realm of knowledge.

In writing your specific purpose statement, you will take three contributing elements (shown in figure 11.1.2) that will come together to help you determine your specific purpose:

- You (your interests, your background, past jobs, experience, education, major),
- Your audience
- The context or setting.

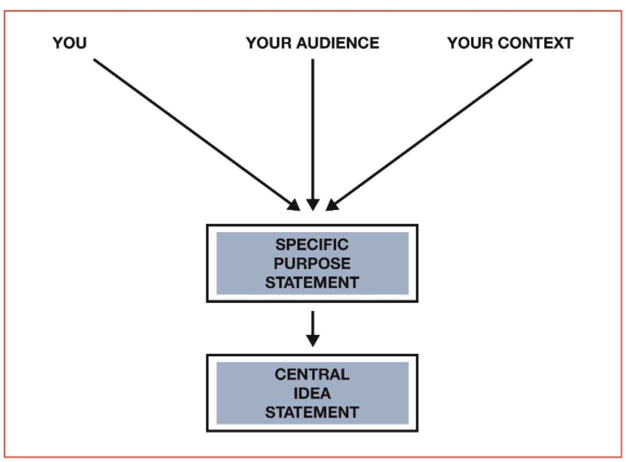

Figure 11.1.2. You, your audience, and your context[4]

3. COMMpadre Media. (n.d.). Speech purpose & central idea [Video file]. Retrieved from https://www.youtube.com/watch?v=jsOxyci_CNM
4. (Tucker & Barton, 2016)

Keeping these three inputs in mind, you can begin to write a specific purpose statement, which will be the foundation for everything you say in the speech and a guide for what you do not say. This formula will help you in putting together your specific purpose statement:

To _______________ [Specific Communication Word (inform, explain, demonstrate, describe, define, persuade, convince, prove, argue)] my [Target Audience (my classmates, the members of the Social Work Club, my coworkers] ___________________. [The Content (how to bake brownies, that Macs are better than PCs].

Example: The purpose of my presentation is to demonstrate to my coworkers the value of informed intercultural communication.

Formulating a Central Idea Statement

While you will not actually say your specific purpose statement during your speech, you will need to clearly state what your focus and main points are going to be. The statement that reveals your main points is commonly known as the central idea statement (or just the central idea). Just as you would create a thesis statement for an essay or research paper, the central idea statement helps focus your presentation by defining your topic, purpose, direction, angle, and/or point of view. Here are two examples:

Specific Purpose – To explain to my classmates the effects of losing a pet on the elderly.

Central Idea – When elderly people lose their animal companions, they can experience serious psychological, emotional, and physical effects.

Specific Purpose – To demonstrate to my audience the correct method for cleaning a computer keyboard.

Central Idea – Your computer keyboard needs regular cleaning to function well, and you can achieve that in four easy steps.

Knowing the audience

Given the diverse nature of audiences, the complexity of the communication process, and the countless options and choices to make when preparing your presentation, you may feel overwhelmed. One effective way to address this is to focus on ways to reach, interact, or stimulate your audience. All audiences fall into four categories: friendly, neutral, uninterested, or hostile (see Figure 32.3). No matter the audience, your job is to deliver a presentation that will address the needs of your audience. Ask yourself these questions to determine how well your presentation will meet the needs of your audience:

- How will this topic appeal to this audience?
- Does the presentation meet my audience's needs?
- What strategy or strategies will be most effective in communicating the information to my audience?
- What activities will encourage the audience to remember the main points of the presentation?

Audience Members	Organizational Pattern	Delivery Style	Supporting Material
Friendly			
They like you and your topic.	Use any pattern. Try something new. Involve the audience.	Be warm, pleasant, and open. Use lots of eye contact and smiles.	Include humour, personal examples, and experiences.
Neutral			
They are calm, rational; their minds are made up, but they think they are objective.	Present both sides of the issue. Use pro/con or problem/solution patterns. Save time for audience questions.	Be controlled. Do nothing showy. Use confident, small gestures.	Use facts, statistics, expert opinion, and comparison and contrast. Avoid humour, personal stories, and flashy visuals.
Uninterested			
They have short attention spans; they may be there against their will.	Be brief—include no more than three points. Avoid topical and pro/con patterns that seem lengthy to the audience.	Be dynamic and entertaining. Move around. Use large gestures.	Use humour, cartoons, colourful visuals, powerful quotations, and startling statistics.
	Avoid darkening the room, standing motionless, passing out handouts, using boring visuals, or expecting the audience to participate.		
Hostile			
They want to take charge or to ridicule the speaker; they may be defensive, emotional.	Organize using a noncontroversial pattern, such as a topical, chronological, or geographical strategy.	Be calm and controlled. Speak evenly and slowly.	Include objective data and expert opinion. Avoid anecdotes and humour.
	Avoid a question-and-answer period, if possible; otherwise, use a moderator or accept only written questions.		

Figure 11.1.3: Different audiences will require an adjustment to presentation style and organizing pattern.

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DEVELOPING AND ORGANIZING CONTENT

Presentation Outline

You're now ready to prepare an outline for your presentation. To be successful in your presentation, you'll need two outlines: a **preparation outline**, and a **speaking outline**.

Preparation outlines are comprehensive outlines that include all of the information in your presentation. Your presentation outline will consist of the content of what the audience will see and hear. Eventually, you will move away from this outline as you develop your materials and practice your presentation.

Your speaking outline will contain notes to guide you; notes that are usually not shared with your audience. It will summarize the full preparation outline down to more usable notes. You should create a set of abbreviated notes for the actual delivery.

Your organizational model will help determine how you will structure (see below) your preparation outline. You can use your presentation outline as a starting point to developing your speaking outline. It's a good idea to make speaking notes to align with your main points and visuals in each section. Figure 11.1.4[5] provides the basic parts of a presentation outline.

Figure 11.1.4: An overview of the steps involved in putting together a presentation outline

Developing the Content

The general organization for presentations includes:

1. **Attention Statement**: an engaging or interesting statement that will cause your audience to sit up and take notice.
2. **Introduction**: setting out your general idea statement (LINK) and giving the audience an idea of what to expect.
3. **Body**: This section contains your research, main points, and other relevant information. It will follow your organizational pattern.
4. **Conclusion**: reiterating your idea statement, and/or includes a call-to-action — what you want the audience to do or think about following your presentation.
5. **Residual Message**: this is an optional section, but a powerful one. It is the final message you want the audience to remember.

5. Reed, G. (2017). Your go-to presentation outline. Ethos3.com. Retrieved from https://www.ethos3.com/2017/01/your-go-to-presentation-outline-template/

In putting together a presentation, presenters will often use examples and scenarios to help illustrate their message. The main difference between examples and scenarios is that while both help "show" the audience what you mean, an example is the "thing" itself, while a scenario would include more detail about the sequence or development of events. Scenarios also tend to be longer and more nuanced.

Storytelling can be an effective way to convey your message to your audience. Stories are a fundamental part of the human experience, and, if well-told, can resonate with listeners. Some of the most inspiring speakers use storytelling effectively in their presentations. You can find out more about how to incorporate storytelling techniques into presentations from the video below.

Video[6]

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https://pressbooks.nscc.ca/nscccommtrades/?p=210#h5p-95

Introduction

"The next 10 minutes might save your life"

"In the end, we will not remember the words of our enemies but the silence of our friends"

Did these quotes heighten your interest in what the speaker is about to say?. During the first two to three minutes of a presentation, **gaining the attention** of listeners is crucial. Using words and phrases (like the ones above) and effective visual aids will make an immediate impact on listeners and capture their attention. Presentations that are able to immediately capture the audience's attention are also more likely to keep the audience's attention throughout. Take a minute to view these effective presentations attention getters from experienced and established speakers at TedTalks.

Effective attention-getting strategies that you can incorporate into a presentation include:

- Tell a compelling story that illustrates an important and relevant point.
- Ask a question that will get your audience thinking about your message.
- Share an intriguing, unexpected, or shocking detail.
- Open with an amusing observation about yourself, the subject, or the circumstances surrounding the presentation.

In addition, to stimulate the listener's interest, the introduction must also establish the speaker's credibility, and preview the main points of the presentation.

How to Do a Presentation – 5 Steps to a Killer Opener Video[7]

6. Standford Graduate School of Business. (2013). Nancy Duarte: How to tell a story [Video file]. Retrieved from https://www.youtube.com/watch?v=9JrRQ1oQWQk

7. Rule the Room. (2013, July 26). How to Do a Presentation - 5 Steps to a Killer Opener(video). YouTube. https://youtu.be/dEDcc0aCjaA

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To establish **credibility** with an audience, provide information on the qualification that empower you to speak about the topic: your job, experience, education, knowledge, etc. Credibility is established by connecting your qualifications to the presentation's subject matter. If you are not a well-known authority on the matter, establishing your credibility will go along way to influence the audience's decision to listen to your presentation and to take it seriously.

The Introduction must also **preview** the main points the presentation will discuss. The preview will provide a broad overview of the presentation's main points and indicate the order each point will be discussed. Using a visual aid to present the points and their order is often an effective strategy.

The Body

Most of your presentation will be spent filling in the details of the main points first announced in the Introduction of your presentation. Effective presenters do not overwhelm their audience with too much information. Instead, effective presenters streamline their presentations by including only one or two important details for each main point. To accomplish this task, a presenter must be very informed on the topic and very aware of the audience in order to determine what information will be most impactful to a particular audience. No matter the audience, too much information can confuse listeners and conceal the central message of the presentation. So keep presentations simple and logical. Applying one of several organizing systems to a presentation will assist in streamlining information. For example: **Chronology, Comparison/Contrast**, **Importance**, or **Best/Worst Cases**.

An important part of any presentation is knowing how to connect your main points in a relevant manner, so that your presentation appears fluid? Using transitional words and phrases provide is one method to help the audience follow the speaker's ideas, connect the main points to each other, and see the relationships you've created in the information you are presenting. Transitions are used by the speaker to guide the audience in the progression from one significant idea, concept or point to the next issue. They can also show the relationship between the main point and the support the speaker uses to illustrate, provide examples for, or reference outside sources. Depending on your purpose, transitions can serve different roles as you help create the glue that will connect your points together in a way the audience can easily follow.

Table 1: Examples of Presentation Transitions

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An interactive H5P element has been excluded from this version of the text. You can view it online here:
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CONCLUSION

The concluding section of a presentation acts very much like a concluding paragraph for an essay: it summarizes the information presented. However, for presentations, the concluding section also provides additional benefits for presentations. An effective conclusion will

- Provide a transition signaling the end of the presentation
- Summarize the main themes of the presentation
- Leave the audience with specific and noteworthy takeaways
- Motivate the audience to take action

The conclusion should be memorable. Ask yourself the question: what do you want my audience to remember most? The answer to that question is the subject of your conclusion. Don't just say the same things you said during the presentation. Breath fresh air into the information or come at the information from another angle. End on a strong and positive note. Think through and plan your last remarks to ensure the audience walks away with a positive impression of you and your company.

How to End a Presentation Video[8]

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TYPES OF BUSINESS PRESENTATIONS

As we've discussed, a presentation will have one of three general purposes: to inform, to persuade, or to entertain. However, each of these purposes may be required to deliver many different types of information. In business, you will be involved in different projects, assignments, departments, etc., and be required to provide updates, reports, and overviews of the various activities. A presentation about an ongoing project to your supervisor will not be the same type of presentation provided to the sales team; the type of presentation students give for a class assignment, is not the same type of weekly presentation your instructor provides. There are many types of business presentations. Understanding each type will help to ensure you target your message to the right audience in the right way.

8. Communication Coach Alex Lyon. (2017). *How to end a presentation* [Video file]. Retrieved from https://www.youtube.com/watch?v=fBO0riisOzU

Briefings: A condensed account of business situation. Briefings bring the members of a department or project together so information can be shared and discussed.

Reports: Routine reports on ongoing projects, issues, problems, or proposals are expected. There are many types of routine reports, including progress, convention, incident, trip, etc. During your career, you may be required to present one or more of these types of reports to your superiors, colleagues, or rank-and-file employees, inside and outside your organization. This type of presentation ranges from very simple presentations with minimal audio-visual and multimedia integration to presentations that include elaborate audio-visual and multimedia integration.

Podcasts: A podcast is an online, prerecorded audio clip delivered online. Podcasts are used by companies to present up-to-date information on current products and services. In addition, podcasts are being used to introduce and train employees.

Virtual Presentations: Business teams are often composed of individuals who are not in the same geographic location or perhaps have to work collaboratively outside of normal office hours. This type of collaborative effort is greatly facilitated by the availability of information technology. In your career, you may be required to work with a remote team to develop and present a project or different types of reports by making a virtual presentation. The steps to developing effective virtual presentations are the same as any other type of presentation.

Webinars: A webinar is a web-based presentation that is transmitted digitally, with or without video. Companies use webinars in a similar manner to podcasts. Company products and services as well as employee training and introductions are presentations common to webinars.

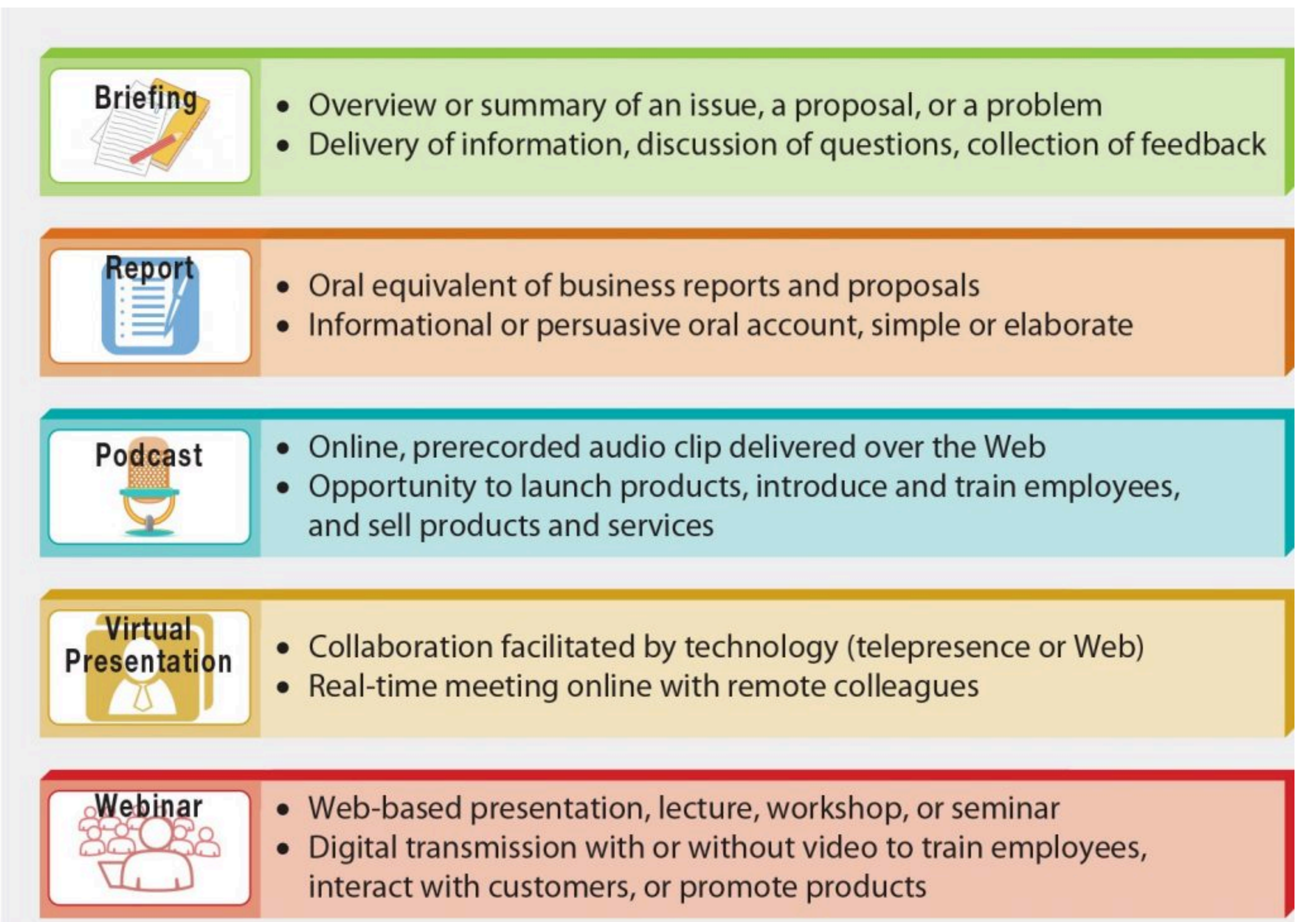

Figure 11.1.5: A summary of the different types of business presentations

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Key Takeaway

- All presentation must have a general purpose, specific purpose and central idea statements is
- Correctly profiling an audience will ensure your presentation delivers the right message in the most effective manner
- All presentations include an attention getter, introduction, body, and conclusion.
- Correctly matching the message to the correct type of presentation will increase the effectiveness of the message

Exercises

1. Interview one or two individuals in your professional field. How is oral communication important in this profession. Does the need for oral skills change as one advances? What suggestion can these people make to newcomers to the field for developing proficient oral communication skills?

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11.2 INFORMATIVE AND PERSUASIVE PRESENTATIONS

Learning Objectives

After studying this unit, you will be able to

- describe the functions of the speech to inform
- provide examples of four main types of speeches to inform
- understand how to structure and develop a speech to inform
- identify and demonstrate how to use six principles of persuasion
- describe similarities and differences between persuasion and motivation
- identify and demonstrate the effective use of five functions of speaking to persuade

INTRODUCTION

Regardless of the type of presentation, you must prepare carefully. Are you trying to sell life insurance to a group of new clients, or presenting a proposal to secure financing to expand your business operation? Are you presenting the monthly update on the different sales divisions in your company, or providing customers with information on how to upgrade their latest computer purchase. Your future career will require you to present both to inform or to persuade. Knowing the difference between these two types of presentations and knowing how to construct each type of presentation will be beneficial to your future careers.

Informative vs Persuasive Video[1]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=216#h5p-101

1. Lyon, A. (2019). Informative vs persuasive [Video file]. Retrieved from https://www.youtube.com/watch?time_continue=1&v=85gg_pgij4I

PRESENTING TO INFORM

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.

Functions

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: 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.

Increasing 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: 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 of it as you do. It is your responsibility to consider ways to display the information effectively.

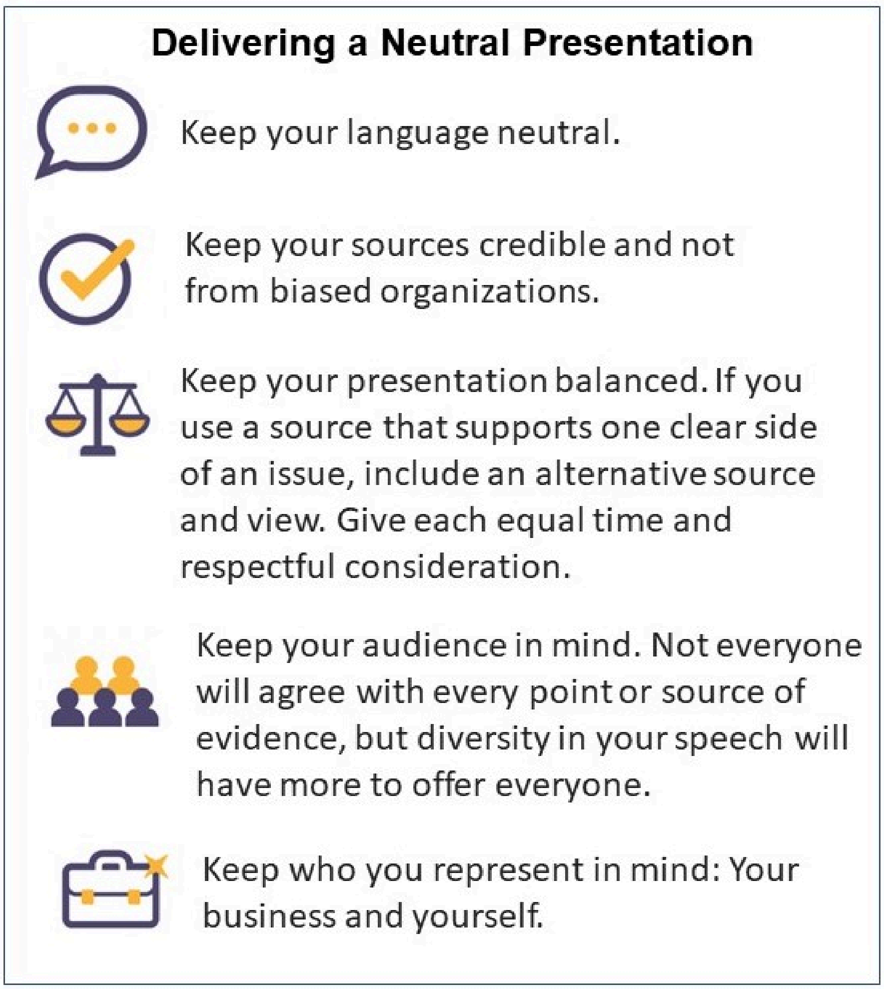

Figure 11.2.1: Five tips to ensure an objective and unbiased presentation.

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 the 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 needs as they learn about the content, not your feelings, attitudes, or commentary on the content.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=216#h5p-102

Types of Informative Presentations

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**. Each type of informative speech is described below.

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.

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 an 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 on the 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.

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Creating an Informative Presentation

An informational presentation is a 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 33.1 below describes five main parts of a presentation to inform.

Table 11.2.1. 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 11.2.2 below and apply them to your presentation.

Table 11.2.2 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	• 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.
Introduction	Develop an opening that will 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. Now let's watch an example of an informative speech.

Informative Speech Example Video[2]

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https://pressbooks.nscc.ca/nscccommtrades/?p=216#h5p-103

THE PERSUASIVE PRESENTATION

No doubt there has been a time when you wanted to achieve a goal or convince someone about a need and you thought about how you were going to present your request. Consider how often people 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

2. Comm Studies. (2019). Informative speech example [Video file]. Retrieved from https://www.youtube.com/watch?v=StPSgqwCnVk&t=60s

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.

Persuasion is an act or process of presenting arguments to move, motivate, or change the mind of your audience. Persuasion can be implicit or explicit and can have both positive and negative effects. 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. Let's view the video below for an overview of the principles of a persuasive presentation.

How to Organize a Persuasive Speech or Presentation Video[3]

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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: **Reciprocity**, **Scarcity**, **Authority**, **Commitment and consistency**, **Consensus**, and **Liking**.

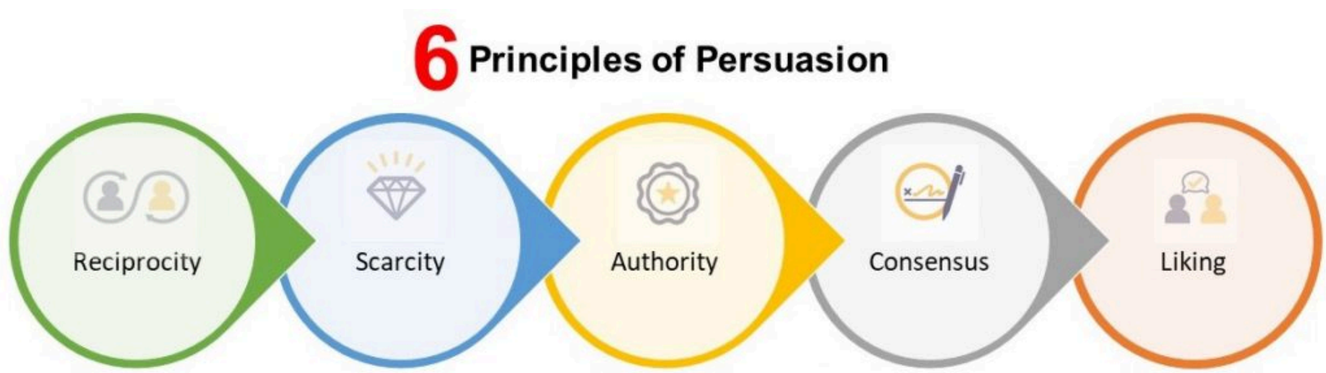

Figure 11.2.2: Integrating some or all of these principles into your presentation will make it truly persuasive.

DEVELOPING A PERSUASIVE PRESENTATION

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

3. Lyon, A. (2017). How to Organize a Persuasive Speech or Presentation [Video file]. Retrieved from https://www.youtube.com/watch?v=jnfoFN7TBhw

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. Audience members are likely to hold their own beliefs and are likely to have 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. Here is a five-step checklist to motivate your audience into some form of action:

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 that will motivate your audience to take action…

Include a Call to Action

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. 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 consider 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 that 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. You won't be asking for action in this presentation, simply to consider an alternative perspective.

Develop Tolerance of Alternate Perspectives

Finally, you may want to help your audience develop tolerance for alternate perspectives and viewpoints. 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. Watch the following video of a persuasive speech with annotation to see the concepts above in action.

Sample Persuasive Presentation Video[4]

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https://pressbooks.nscc.ca/nscccommtrades/?p=216#h5p-106

PERSUASIVE STRATEGIES

When you make an argument in a persuasive speech, you will want to present your position logically by 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 a 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 33.3 as a claim, data, and warrant.

Table 11.2.3 Rhetorical strategy.

4. Costa, J. (2013, October 25). sample persuasive presentation. YouTube. https://youtu.be/d38SPYhY4m4

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 psychological and physical reactions, 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.

Figure 11.2.3: Positive or negative, knowing how to use emotions will make your presentations more persuasive (littleleague.org, 2020)

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. The video below reviews how to effectively integrate emotion, logic and credibility into your presentation.

Ethos Pathos Video[5]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=216#h5p-107

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=216#h5p-108

DeVito[6] offers five key principles to acknowledge the role emotions play in communication and offer guidelines for there 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

5. Lyon, A. [Communication Coach Alex Lyon].(2017). Ethos Pathos Logos [Video file]. Retrieved from https://www.youtube.com/watch?v=2ey232I5nUk

6. Enter your footnote content here.

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.

PRESENTING ETHICALLY

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.

Figure 11.2.4 offers eleven points from the book *Ethics in Human Communication*[7]. These points should be kept in mind as you prepare and present your persuasive message.

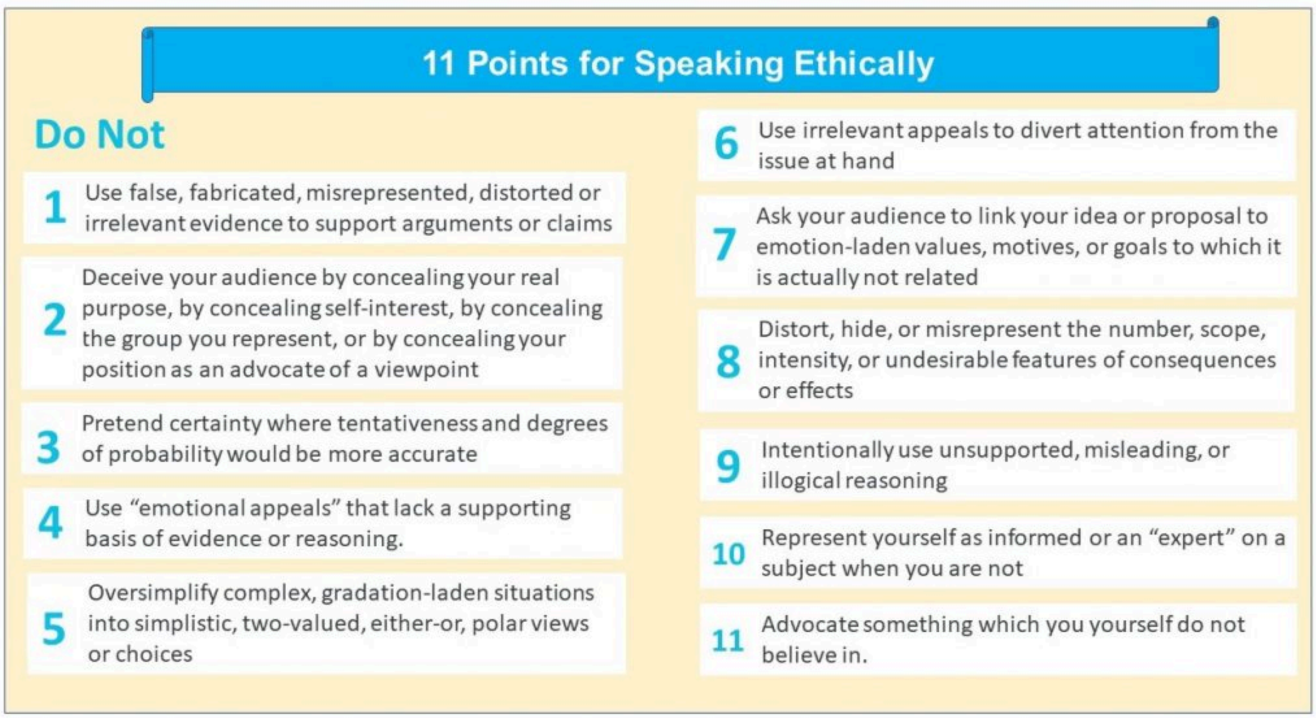

Figure 11.2.4: Eleven points on how to ensure your presentation remains ethical.

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.

7. (Johannesen, 1996)

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=216#h5p-109

Key Takeaway

- Understand the function of your informative presentation in order to communicate the right message to the right audience.
- Organize your information presentation using the five main parts of an informative presentation
- Use the six principles of persuasion to develop your persuasive presentation
- Use the Rhetorical Strategy to construct will developed arguments
- Integrate emotional appeal to effectively engage your audience

Exercise

1. 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:

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

Task: Write an elevator speech for your next networking event to introduce yourself to prospective employers.

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11.3 DELIVERING A PRESENTATION

Learning Objectives

After studying this unit, you will be able to

- identify the different methods of speech delivery
- identify key elements in preparing to deliver a speech
- understand the benefits of delivery-related behaviours
- utilize specific techniques to enhance speech delivery

INTRODUCTION

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.

7 Tips to Overcome Your Fear of Public Speaking Video[1]

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Delivery is what you are probably most concerned about when it comes to giving presentations. This unit 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

1. Cityline. (2017). 7 tips to overcome your fear of public speaking [Video file]. Retrieved from https://www.youtube.com/watch?v=mL5WNcLz8t

"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 nonverbal 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. The video below reviews all four methods.

Types of Delivery for Speeches and Public Speaking Video[2]

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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 pre-planned, 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

2. Lyon, A. (2017). Types of delivery for speeches and public speaking [Video file]. Retrieved from https://www.youtube.com/watch?v=0KBD4W1w89c&t=25s

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

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.

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.

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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 the 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.

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. Practicing 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 the 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, practicing 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.

> An interactive H5P element has been excluded from this version of the text. You can view it online here:
> https://pressbooks.nscc.ca/nscccommtrades/?p=219#h5p-113

NON-VERBAL ELEMENTS OF DELIVERING A PRESENTATION

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.

Use Body Language to Rock your Next Presentation Video[3]

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=219#h5p-114

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.

Figure 11.3.1[4]

Figure 11.3.1: Ten Tips for delivering effective presentations (Infogrades.com, 2020).

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.

3. Stanford Graduate School of Business. (2017). Use body language to rock your next presentation [Video file]. Retrieved from https://www.youtube.com/watch?v=pp4YlyXjcKI&feature=emb_logo
4. Infogrades. (2020). Cheat sheet for becoming a public speaking expert. Retrieved from https://www.infogrades.com/society-infographics/cheat-sheet-for-becoming-a-public-speaking-expert/

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 to be spent making eye contact with your audience (Lucas, 2015, p. 250).

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.

Key Takeaway

- Many employees may not like public speaking, but it is a normal part of the business environment.
- Good preparation helps to relieve the feelings of anxiety experienced by many presenters.
- There are different types of delivery techniques to best deliver different types of messages.
- Your delivery should look as natural as possible.

Exercises

1. Take a business idea you have, a familiar business topic you care about, or a promotion or raise you want to request in a time of tight budgets and a tough job market. Create a spontaneous two to five-minute speech making a good case for your core message. First deliver the speech in front of a

mirror. What did you notice about your presentation and delivery style? Next, present your speech to a classmate and ask for constructive feedback on your delivery style.

11.4 VISUAL AIDS

Learning Objectives

After studying this unit, you will be able to

- identify when and how visual aids will enhance a presentation
- identify the different types of visual aids
- identify effective and ineffective use of visual aids
- apply basic design principles to slide design
- identify best practices to incorporating visual aids in a presentation

INTRODUCTION

Visual aids can be a very powerful tool to enhance the impact of your presentations. Words and images presented in different formats can appeal directly to your audience's imagination, adding power to your spoken words.

Learning how to create effective visuals that resonate with your audience is important for a quality presentation. Understanding basic principles of how visual information is processed alone and in combination with audio information can make or break your visuals' effectiveness and impact. Incorporating visuals into your speech that complement your words rather than stand in place of them or distract from them, will set you apart from other presenters, increase your credibility, and make a bigger and more memorable impact on your audience. A brief overview of the importance of visual aids is presented below. Part II of the Module noted in the video is provided later on this page.

The Importance of Effective Visual Aids Video[1]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=224#h5p-115

1. UMW QEP. (2015). *The importance of effective visual aids* [Video file]. Retrieved from https://www.youtube.com/watch?v=2ShnDmuueI0&t=2s

TYPES OF VISUAL AIDS

When selecting a visual aid, it is important to choose one appropriate to the information being presented. Information generally falls into one of two categories:

- Statistical: to help the audience visualize relationships between numbers, use pie charts, line charts, and bar charts.
- Illustrative: to visually describe an idea or concept, use pictures or symbols.

Keep in mind the size of your audience, the type of room in which you will be presenting, and how best to support your presentation when selecting a visual aid. Think about using a variety of visual aids in your presentation: PowerPoint, projectors, white/blackboard, flipcharts, handouts, or video sequences. Be creative and deliberate in your choice of visual aid to achieve the most impact. Let's view the following video before looking specifically at different types of visual aids.

Presentation Aids Video[2]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=224#h5p-116

PowerPoint (or equivalent)

Microsoft PowerPoint is probably now the most commonly used form of visual aid. PowerPoint is a computer program that allows you to create and show slides to support a presentation. You can combine text, graphics and multimedia content to create professional presentations. As a presentation tool PowerPoint can be used to:

- organize and structure your presentation;
- create a professional and consistent format;
- provide an illustrative backdrop for the content of your presentation;
- animate your slides to give them greater visual impact.

PowerPoint has become enormously popular and you are likely to have seen it used by your lecturers and fellow students. Learning to present with PowerPoint will increase your employability. Used well, PowerPoint can improve the clarity of your presentations and help you to illustrate your message and engage your audience. However, it can have the opposite effect. Table 35.1 presents the general principles.

Table 35.1 General PowerPoint Principles

2. COMMpadres Media. (2016). Presentation aids [Video file]. Retrieved from https://www.youtube.com/watch?v=ZC4q6lykPUQ

Do	Don't
use a big enough font (minimum 20pt)	make it so small you can't read it
keep the background simple	use a fussy background image
use animations *when appropriate*	but don't over-do the animation – it gets distracting
make things visual	use endless slides of bulleted lists that all look the same
direct your audience's attention to slides containing key information	just read out the text on the slides
give your audience time to read the information on your slides	

Overhead projector slides/transparencies

Overhead projector slides/transparencies are displayed on the overhead projector (OHP) – a very useful tool found in most lecture and seminar rooms. The OHP projects and enlarges your slides onto a screen or wall without requiring the lights to be dimmed. You can produce your slides in three ways:

- pre-prepared slides: these can be words or images either handwritten/drawn or produced on a computer;
- spontaneously produced slides: these can be written as you speak to illustrate your points or to record comments from the audience;
- a mixture of each: try adding to pre-prepared slides when making your presentation to show movement, highlight change or signal detailed interrelationships.

Make sure that the text on your slides is large enough to be read from the back of the room. A useful rule of thumb is to use 18 point text if you are producing slides with text on a computer. This should also help reduce the amount of information on each slide. Avoid giving your audience too much text or overly complicated diagrams to read as this limits their ability to listen. Try to avoid lists of abstract words as these can be misleading or uninformative.

White or blackboard

White or blackboards can be very useful to help explain the sequence of ideas or routines, particularly in the sciences. Use them to clarify your title or to record your key points as you introduce your presentation (this will give you a fixed list to help you recap as you go along). Rather than expecting the audience to follow your spoken description of an experiment or process, write each stage on the board, including any complex terminology or precise references to help your audience take accurate notes. However, once you have written something on the board you will either have to leave it there or rub it off – both can be distracting to your audience. Check to make sure your audience has taken down a reference before rubbing it off – there is nothing more frustrating than not being given enough time! Avoid leaving out-of-date material from an earlier point of your presentation on the board as this might confuse your audience. If you do need to write 'live', check that your audience can read your writing.

Paper handouts

Handouts are incredibly useful. Use a handout if your information is too detailed to fit on a slide or if you want your audience to have a full record of your findings. Consider the merits of passing around your handouts at the beginning, middle, and end of a presentation. Given too early and they may prove a distraction. Given too late and your audience may have taken too many unnecessary notes. Given out in the middle and your audience will inevitably read rather than listen. One powerful way of avoiding these pitfalls is to give out incomplete handouts at key stages during your presentation. You can then highlight the missing details vocally, encouraging your audience to fill in the gaps.

Flip chart

A flip chart is a large pad of paper on a stand. It is a very useful and flexible way of recording information during your presentation – you can even use pre-prepared sheets for key points. Record information as you go along, keeping one main idea to each sheet. Flip back through the pad to help you recap your main points. Use the turning of a page to show progression from point to point. Remember to make your writing clear and readable and your diagrams as simple as possible.

Video

Video gives you a chance to show stimulating visual information. Use video to bring movement, pictures and sound into your presentation. Always make sure that the clip is directly relevant to your content. Tell your audience what to look for. Avoid showing any more films than you need.

Artifacts or props

Sometimes it can be very useful to use artifacts or props when making a presentation. If you bring an artifact with you, make sure that the object can be seen and be prepared to pass it around a small group or move to different areas of a large room to help your audience view it in detail. Remember that this will take time and that when an audience is immersed in looking at an object, they will find it hard to listen to your talk. Conceal large props until you need them; they might distract your audience's attention.

Figure 11.4.1[3]

3. Guffey, M., Loewry, D., & Griffin, E. (2019). Business communication: Process and product (6th ed.). Toronto, ON: Nelson Education. Retrieved from http://www.cengage.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9780176531393&template=NELSON

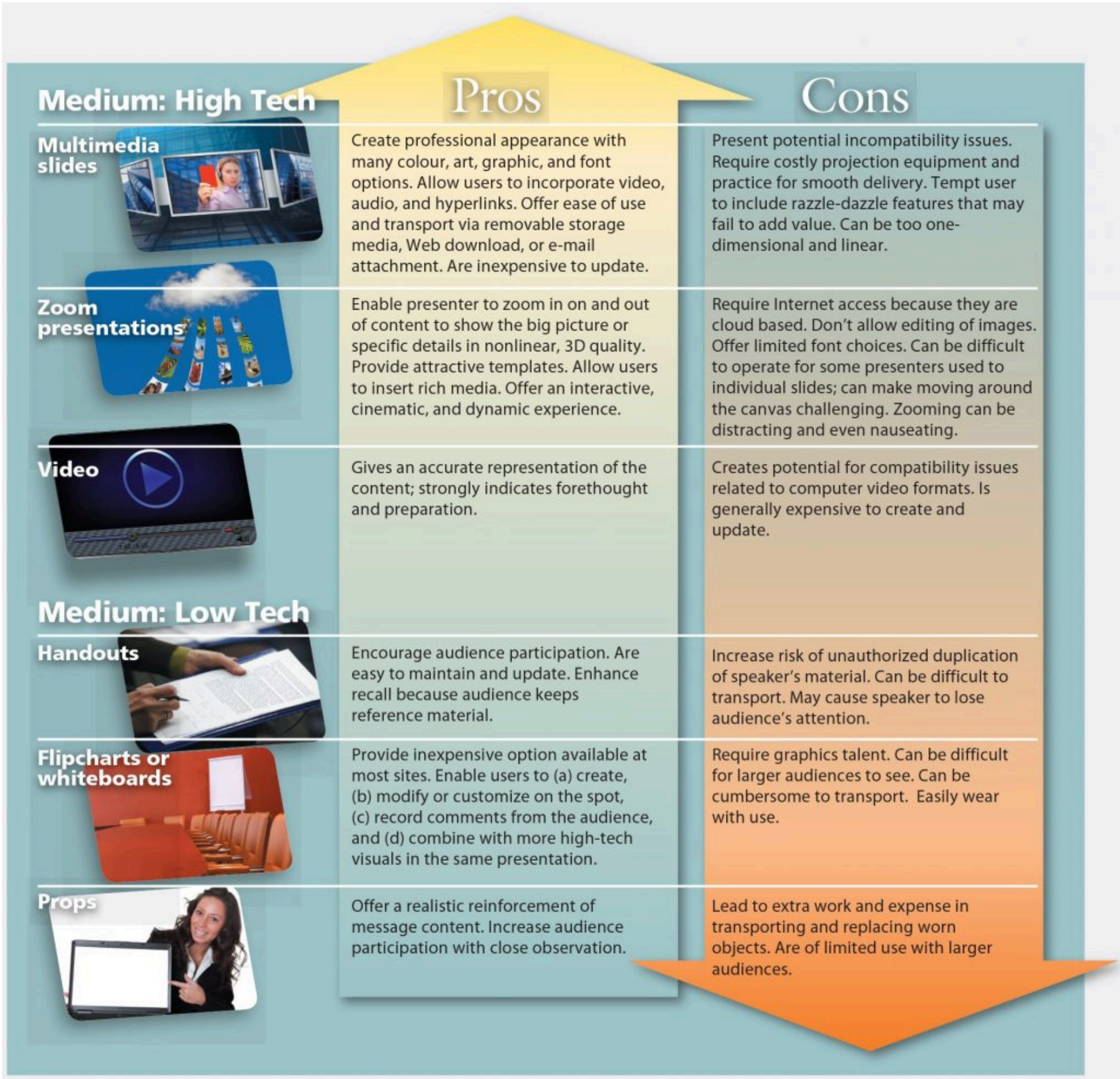

Figure 11.4.1: Using different types of visual aids will increase the impact and effectiveness of your presentation

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https://pressbooks.nscc.ca/nscccommtrades/?p=224#h5p-117

WHEN TO USE VISUAL AIDS

Words and images can be used throughout your presentation from the introduction to the conclusion. However, remember to restrict their use to key moments in your presentation; an overuse of visual aids can be hard to follow.

Think about using visual aids at the following times:

Introduction

- display the title of your presentation;
- define particular technical terms or units;
- indicate a structure to your presentation by listing your main points;
- display an image that encapsulates your theme(s);
- highlight a question you intend to answer during the course of your presentation;

Main points

- highlight new points with an appropriate image or phrase;
- support technical information with clearly displayed data;
- indicate sequence by linking points together;
- offer evidence from your research to support your argument;

Conclusion

- summarise your main points on a slide;
- present your conclusion in a succinct phrase or image;
- display your key references to allow your audience to read more on your topic.

DESIGNING VISUAL AIDS

There are many different rules for designing visual aids, some of which will apply directly to different kinds of equipment. In general, sticking to the following guidelines will produce high-quality visual images.

1. Help the audience quickly understand the visual.

Figure11.4.2[4]

Figure 11.4.2: Using the guidelines will help you produce effective visuals for your presentations

4. Guffey, M., Loewry, D., & Griffin, E. (2019). Business communication: Process and product (6th ed.). Toronto, ON: Nelson Education. Retrieved from http://www.cengage.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9780176531393&template=NELSON

- use one simple idea for each visual;
- make the text and diagrams clear and readable;
- avoid cluttering the image;
- keep your images consistent (use the same font, titles, layout, etc. for each image);
- make sure your images are of high quality (check for spelling and other errors).

2. Use the 3 T's

When using visual aids in your presentation, follow the three T's: touch turn, and talk.

- TOUCH (or at least gesture toward) and *look at* the chart or screen; read it silently to yourself to give the audience time to read it.
- TURN towards the audience.
- TALK to the audience, not to your visual.

3. Be aware of your position.

Stand to the left of the screen or display to avoid blocking anyone's view. Avoid stepping in front of the visuals unless you are adding something to a flip chart; it's very difficult to write well from the side. When gesturing towards the visuals, keep your hands open and do not point. Avoid staring at the visual aids as well; you need to maintain a connection to the audience through eye contact. At all times, remember that *you are still the presenter!* So, don't hide behind your visuals. You are not there to read a PowerPoint to the audience; add value to each point as you cover it.

4. Know how to use the visual aid.

There is nothing worse than a presenter struggling with their visual aids. Be familiar enough with your tools to ensure that you won't be thrown if something goes wrong. Confident use of visual aids will help marry them to your spoken presentation helping them become part of an impressive performance.

If properly prepared and implemented, visual aids can be an invaluable tool for getting your point across clearly and professionally. Follow these guidelines for maximum impact and improved audience retention!

The Purpose of Visual Aid and Effective Design Tips Video[5]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=224#h5p-118

5. UMW QEP. (2015). The purpose of visual aid and effective design tips [Visual file]. Retrieved from https://www.youtube.com/watch?v=_LPpt2_78LM

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=224#h5p-119

SUMMARY

Use visual aids to display complex information clearly and introduce variety into your delivery technique. Make sure that you are familiar with the equipment required to create and display visual aids, and deploy visual aids creatively in your presentations mixing techniques and media to create an impact. Figure 11.4.3[6] provides a visual summary of how to incorporate visual aids into your presentation.

Figure 11.4.3: Nine steps to ensure visual aids are used to achieve the most effective business presentation

6. Guffey, M., Loewry, D., & Griffin, E. (2019). *Business communication: Process and product* (6th ed.). Toronto, ON: Nelson Education. Retrieved from http://www.cengage.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9780176531393&template=NELSON

Key Takeaway

- Be sure that any visual aid you use adds to what you are saying. Slides should be brief, easy to understand and complement your message.
- When designing slides make sure they are clear and visible to the entire audience.
- Practice your presentation with your visual aids and remember to speak to your audience, not to your visual aid or the screen
- Use a variety of visual aids in your presentation to engage your audience

Exercises 2.1

1. Using the 6×6 Rule, write a series of bullets suitable for use on a PowerPoint slide that summarizes the following information.

We have four specific corporate goals in the year ahead. The first is to introduce new product lines, including cardio equipment. Our second goal is to see our company become a worldwide leader. However, if we are to achieve this goal, our company must expand geographically. Plans are now underway to establish operations in South America and Europe. Finally, we would like to continue 20 percent and higher sales growth.

11.5 GRAPHIC ILLUSTRATIONS AND THE INFOGRAPHIC

Learning Objectives

After studying this unit, you will be able to

- differentiate between various types of graphic illustrations
- understand the importance of visual aids
- understand how to create an infographic illustration

INTRODUCTION

An element of business documents is the inclusion of graphic illustrations. Graphic illustrations show your interpretation of numerical information and visually present that information and the connections found through your interpretation. Graphics can help keep your reader engaged and provide information in a new way that is easier to understand. There is an old saying that a picture is worth a thousand words. Sometimes, despite writing clearly and concisely, your audience will appreciate the presence of supporting graphics–whether that be tables, illustrations, maps, photos, charts, or some other type of graphic illustration. Graphic illustrations

- increases the impact of numerical information
- communicates information in a concise and convincing way
- clarify and simplify complex and dense information
- breaks up long blocks of information into easier to understand segments

Good graphic illustrations serve many purposes. Well-designed graphics will help to communicate your message more effectively than words alone; therefore, graphics can help reduce miscommunication. Graphic illustrations in long and complex documents, like a report or proposal, ensures your message will be more readily understood by a wide and diverse audience. This unit explores the different types of illustrations, their basic format requirements, and a special look at infographics is presented.

TYPES OF GRAPHIC ILLUSTRATIONS

There are numerous kinds of visual aids, including tables, pie charts, bar charts, line graphs, flow charts, line graphs, organizational charts, illustrations, and infographics. Each type of visual aid best depicts a specific type of information. Knowing which visual aid best presents your raw data is important in creating effective visuals that communicate clear and accurate information. Let's begin our discussion by viewing the video below for an overview of when to use different types of graphic illustrations.

Which is the Best Chart: Selecting Among 14 Types of Charts Part I Video[1]

> An interactive H5P element has been excluded from this version of the text. You can view it online here:
> https://pressbooks.nscc.ca/nscccommtrades/?p=235#h5p-120

Tables

Tables are particularly good for showing exact figures and large amounts of information in rows and columns. Tables provide a large amount of data in a very compact but detailed manner and are helpful at attracting readers to specific data and at making comparisons between them. A few hints to create effective tables:

- The table should fit on a singular page. If the landscape page orientation is too small, then change the page layout to portrait.
- Label all parts of the table clearly and identify units in which figures are given.
- For long tables with many rows, shade alternative rows or increase the height of the cells.
- Use the acronym (n/a) or a row of dots/dashes to acknowledge missing data.

Pie Charts

A pie chart is a circular representation of a data set divided into sections that add up to 100 percent. Values of a pie chart start at 12 o'clock with the largest percentage appearing first and gradually smaller percentages included as you work your way around the clock. Pie charts are best used when comparing parts of a whole. To create effective pie charts:

- Include the percentage or specific number for each segment.
- Use a maximum of 4 – 6 segments in a pie chart. If there are several very small segments, group them into one segment labelled "other".
- Separate segments using distinct and complementary colours.
- Ensure labels are horizontal

Figure 11.5.1[2]

1. 365DataScience. (2018). Which is the best chart: Selecting among 14 types of charts Part I [Video file]. Retrieved from https://www.youtube.com/watch?v=C07k0euBpr8
2. Meyer, C. (2017). Communicating for results (4th ed.). Don Mills, ON: Oxford University Press. Retrieved from https://oup-arc.com/access/meyer-4e-student-resources#tag_case-studies and

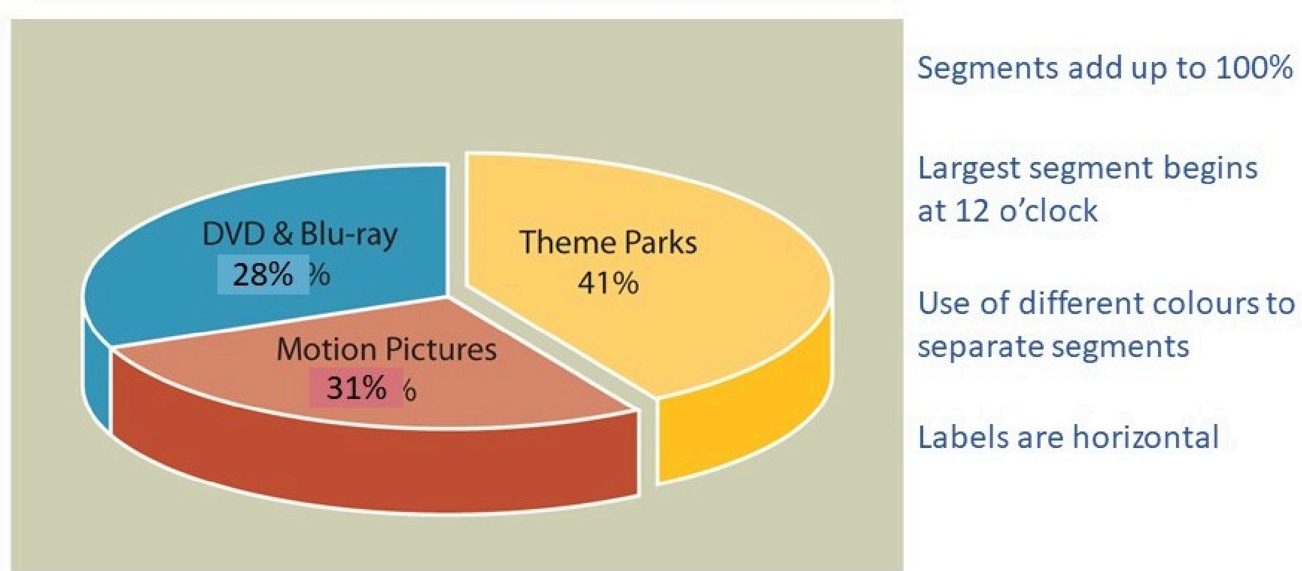

Figure 11.5.1: A typical pie chart and its requirements

Bar Charts

A bar chart should be used to show comparisons between items, comparisons over time, and the relationship between items. A bar chart displays information in columns (called bars) in a horizontal or vertical manner. Bars should be displayed according to chronological or logical order and can be segmented, divided, or stacked. Data must be accurately plotted and each bar should be the same width. To correctly format your bar chart:

- Keep the width of each bar equal
- Start scale at zero
- Avoid adding too much information (labels, legends, etc.) to keep the image simple
- Organize bars close enough to each other to make comparisons easy and meaningful.

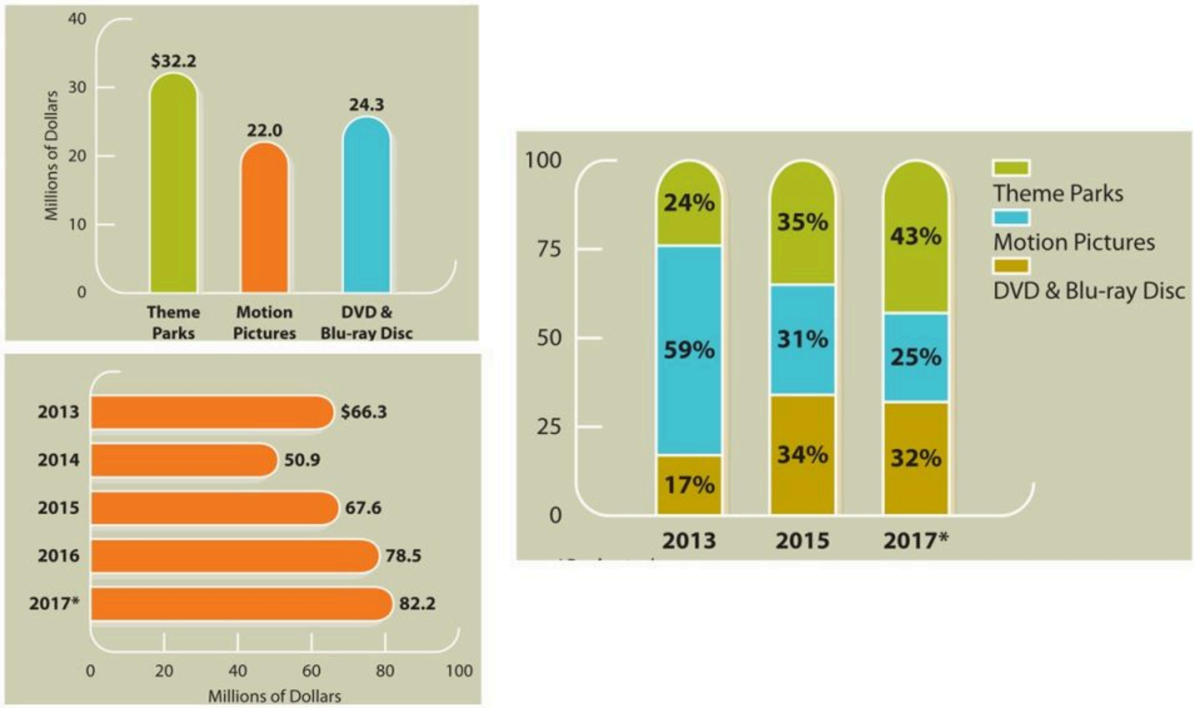

Figure 11.5.2: Three bar chart formats displaying the very same information.

Line Charts

Line charts show how items are related. Line charts can show trends, fluctuations, or progressions over time. A simple line chart will only show one set of data, and multiple line charts show two or more sets of data. To create a line chart

- The time component is measured on the horizontal bar across the bottom of your chart. The vertical bar is used to measure the second value.
- Use different types of lines (solid, dotted, dashed, etc.) to distinguish each variable presented.
- Use accurate values for both horizontal and vertical values to prevent distorting the information
- If necessary, include a key to explain lines and values

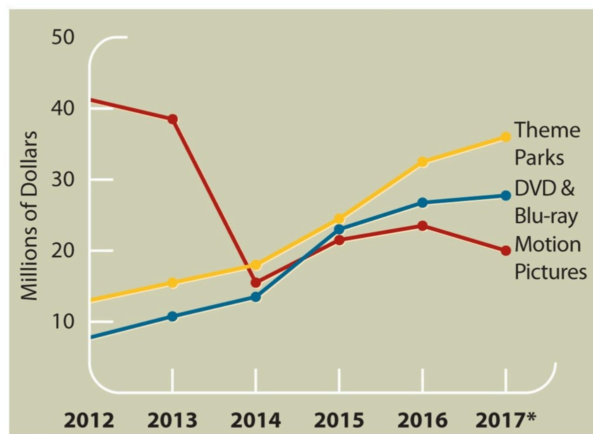

Figure 11.5.3: A multiple line chart displaying the comparison of three separate variables over time

Flowchart

A flow chart lays out a procedure, process, or sequence of movements using shapes joined by arrows to demonstrate how the procedure, process or sequence works. Each shape represents a stage in the process and the arrows indicate what comes next. Flowcharts help to make complex processes and procedures simple to understand. Flow charts typically use shapes in the following way:

- ovals to signal the beginning or end of a process or procedure,
- diamonds to represent a decision point, and
- rectangles to show major activities or steps in the process or procedure.

Pictures

Pictures and illustrations show what something looks like. Pictures add authenticity and provide a visual record and are often used when the reader needs to know details that cannot be provided in any other manner. For example, if a reader needs to know what an item of clothing on a website looks like or what the new head office for the company looks like, a picture is best at communicating this information. In the digital world, using high resolution images and animating images adds another layer of reader engagement to a document.

Infographics and Data Visualization

Infographics create images out of data in a quick, clear, and engaging way. An infographic tells a story using a combination of graphic illustrations. Any sort of data can be displayed using an infographic, but it is most effectively used to display complex data with many components as a way to simplify that information and make it understandable to a wide audience. A typical infographic

- attracts a wide and diverse range of readers
- presents data accurately
- simplifies complex information
- transform pieces of data into a cohesive story

Figure 11.5.4[3]

3. Guffey, M., Loewry, D., & Griffin, E. (2019). Business communication: Process and product (6th ed.). Toronto, ON: Nelson Education. Retrieved from http://www.cengage.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9780176531393&template=NELSON

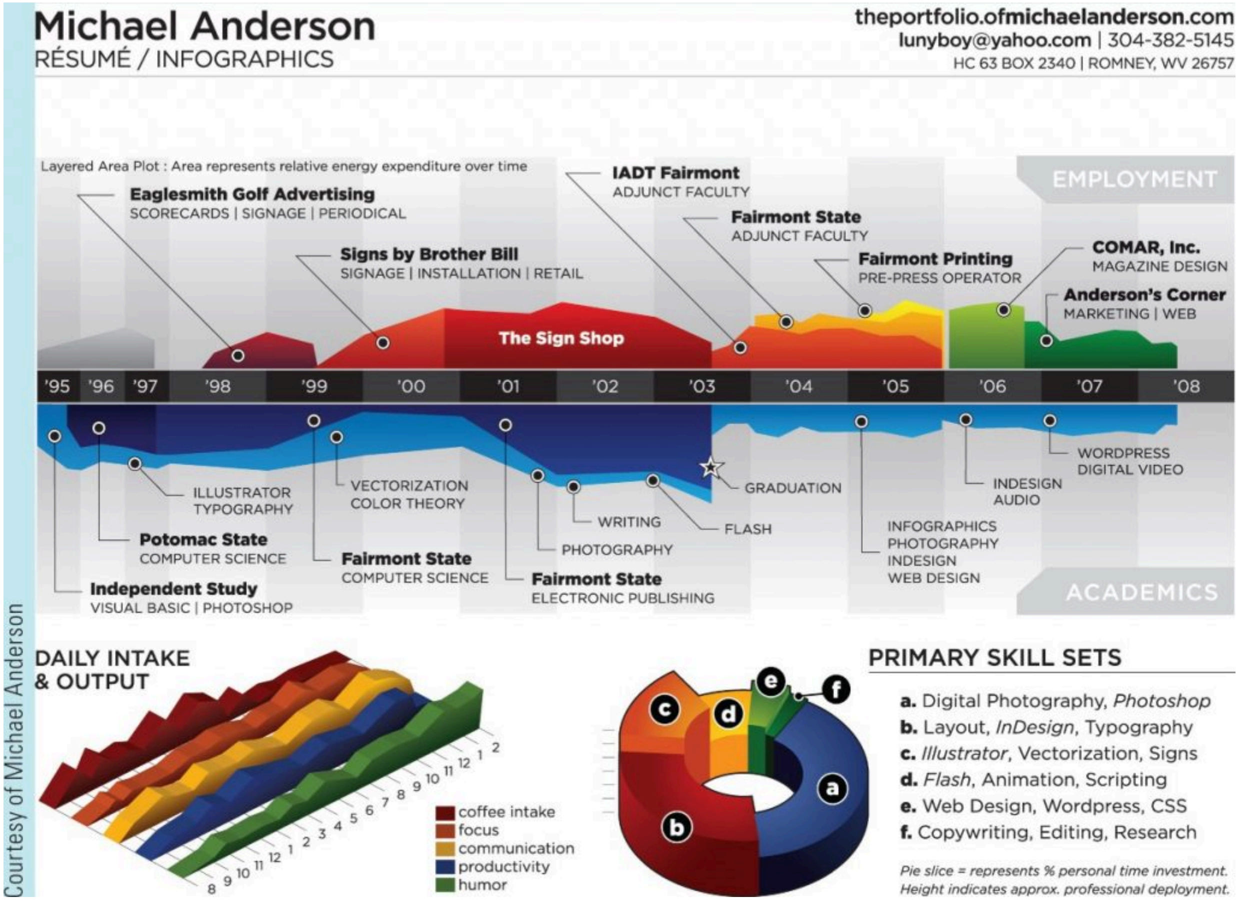

Figure 11.5.4: An infographic presenting the skills, education and work experience in a creative and story like manner

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=235#h5p-121

Table 11.5.2 Types of Graphic Illustrations and their Uses

Type	Purpose
Table	▪ Shows precise, complex, and large amounts of data ▪ Used as extensions of text or as data separated from text
Photo and illustration	▪ Shows what something looks like
Line Chart	▪ Shows trends over time of single or multiple variables
Pie Chart	▪ Shows the percentages of a singular variable that adds up to 100 percent
Bar Chart	▪ Shows comparisons between variable(s)
Infographics	• Shows complex and complicated information as stories using pictures, icons , and graphics
Flowcharts	• Shows how a process, procedure or system works

FORMATTING A GRAPHIC ILLUSTRATION

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

Titles: All illustrations should have a title. Similar to a subject line for a memo or letter, the title of a graphic illustration communicates the main idea of the image and is composed of descriptive nouns and phrases, not full sentences. When creating your title, you may choose to create **descriptive** or **talking titles**. Include your title above the illustration.

Labels: All illustrations also must be labelled. Tables are labelled above the image, but all other illustrations are labelled below the image. Take a look at how the tables and other figures on this page are labelled. In addition, for bar and line charts, you must also label the x and y axis to ensure the reader knows what value is being measured on each axis.

Caption: A caption is a short descriptive passage that describes the image and its relevance. The caption should add important information for the reader and not simply repeat the title or state obvious information. The caption can also describe the data presented or include an interpretation of the data presented.

Legends: A legend are words written on or next to an image that explains information or symbols included as part of the image.

Knowledge Check

Review the following bar chart. Each check mark presents information on a format requirement for graphic illustrations of all types.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=235#h5p-122

Other Formatting Requirements

In addition to the format requirements noted above, when integrating a graphic illustration into your work, consider the following:

- Introduce an illustration close to where the image appears.
- Help the reader understand the significance of the illustration by explaining what to look for or by summarizing the main point of the image. Avoid sentences that give no information other than directing the reader to the figure or table.
- Use a consistent size (not too large or small). Remember, the image must be readable.
- Do not distort the information by manipulating the scale or omitting information.
- Alternate graphics and text on the same page. Don't put graphics on pages by themselves; ideally, no visual should take up more than one-third of any page in your report.

DOCUMENTATION

Many graphic illustrations that you may use in your writing may come from a secondary source of information. Like all information that comes from secondary sources, the illustration must be cited. For a full overview of APA documentation requirements, please visit Unit 9 of this textbook. The following video will also be of assistance in understanding how to use APA 6th Edition to cite images in your documents.

How to Reference an Image from the Internet Video[4]

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=235#h5p-123

THE INFOGRAPHIC

An "Infographic" is a combination of the words "information" and "graphic." In essence, an infographic is a form of visual communication meant to capture attention and enhance comprehension. The infographic is a specific type of visual communication that includes graphics showing data, copy, or both. The infographic uses these elements to communicate a story that attracts readers and promotes understanding.

What is an infographic Video[5]

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=235#h5p-124

Infographic Types and Styles

While there are many different presentations of infographics, there are three general categories that infographics can fall into: **data visualization**, **information design**, **editorial infographics**. Each serves a purpose and is an effective medium of communication when constructed correctly.

4. PolyU ELC. (2017). How to reference an image from the Internet [Video file]. Retrieved from https://www.youtube.com/watch?v=epwdt2h1cDU&feature=emb_logo
5. Octopus Digital. (2015). What is an infographic [Video file]. Retrieved from https://www.youtube.com/watch?v=xV4hnb2XKqc

Infographics provide flexibility of design…you can do almost anything. However, infographics are often one of three styles.

Static Infographics:

These are the most common type of infographics and are easiest to create. These types of infographics involve images, symbols, graphics, etc., but they do not move or provide interactivity.

Animated Infographics: As the name suggests, the animated infographic animates information, which means this type of infographic contains moving elements. Animated infographics are effective at attracting reader attention and at being included on social media, company websites, and in online tutorials. Learn more about animated infographics by visiting this page.

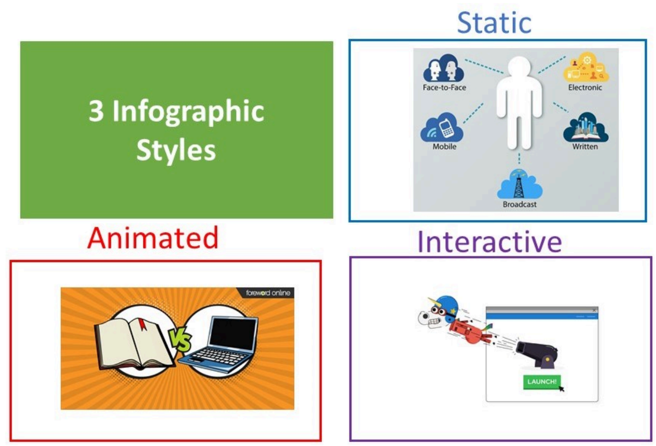

Figure 11.5.5: Designers can choose one of the three types of infographics that best tells their story.

Interactive Infographics: The name of this infographic also foreshadows its distinguishing element: interactivity. Interactivity is best utilized for infographics that present large amounts or complex information. In order to present smaller and more understandable chunks of information, the reader is required to interact with the graphic as the story unfolds. Learn more about interactive infographics by visiting this [page.](page)

> An interactive H5P element has been excluded from this version of the text. You can view it online here:
> https://pressbooks.nscc.ca/nscccommtrades/?p=235#h5p-125

Creating an Infographic

14 Infographic Do's and Don'ts to Design Beautiful and Effective Infographics Video[6]

> An interactive H5P element has been excluded from this version of the text. You can view it online here:
> https://pressbooks.nscc.ca/nscccommtrades/?p=235#h5p-126

6. Visme. (2019). 14 infographic do's and don'ts to design beautiful and effective infographics [Video file]. Retrieve from https://www.youtube.com/watch?v=uBBmbdPbfhw

In addition to the steps explained in the above video, when creating an infographic, keep in mind the principles of visual design. Figure 11.5.6[7]

- begin with an outline (see these [infographic template ideas] to create an outline),
- emphasize the most important elements to create a focal point,
- select one or two easy-to-read fonts.
- use a complementary colour scheme,
- keep the message clear and concise,
- give visual priority over text,
- label the image,
- include a caption, and
- cite all images that you did not create or that do not have an open license.

Their function of all graphic illustrations is to save the reader time, enhance comprehension, and allow rapid comparison and interpretation of relationships or trends. Remember this as you prepare figures, tables, and infographics and present them accordingly.

Figure 11.5.6: The first step in the infographic design process is to create an outline (Easl.ly, 2018).

Consult one of the following sites for additional information on graphic illustrations.

University of North Carolina a Chapel Hill

Statistic Canada

Vimeo

Easl.ly

Venngage

Piktochart

7. Tomboc, K. (2018). Infographic design basics: 3 steps to outlining your infographic. easel.ly. Retrieved from https://www.easel.ly/blog/how-to-outline-an-infographic/

Key Takeaway

- Graphic illustrations help to simplify and clarify information
- Different types of graphics are best to communicate specific data
- Infographics combine images and graphics to illustrate data and information into a visual story
- Readers appreciate well-thought-out and designed graphics of all types.

CHAPTER 12: GROUP COMMUNICATION

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".[1]

1. (Sommers & Dineen, 1984, p. 158).

12.1 TEAMWORK

Learning Objectives

After studying this unit, you will be able to

- define teamwork in professional settings
- compare and contrast positive and negative team roles and behaviours in the workplace
- discuss group strategies for solving problems
- demonstrate best practices in delivering constructive criticism and bad news in person

INTRODUCTION

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" [1]

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

1. (Sommers & Dineen, 1984, p. 158).

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**, 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 a responsible leader
- Promote cooperation
- Clarify goals
- Elicit commitment
- Clarify responsibilities
- Instill prompt action
- Apply technology
- Ensure technological compatibility
- Provide prompt feedback

A Workopolis survey (see Figure 12.1. 1[2]) revealed that 28% of Canadians expect to work at 5 – 10 different places of employment throughout their worklife, and 16% of Canadians expect to have more than 10 places of employment. In such a changing landscape, possessing good team and leadership skills is vital to your career success.

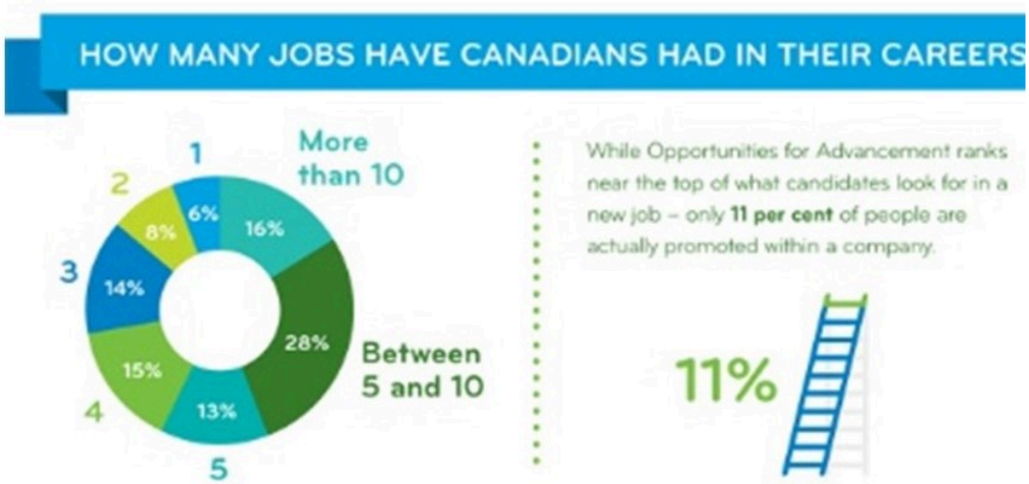

Figure 12.1.1: Survey shows the important of team skills as Canadians are likely to work as part of multiple teams throughout their careers

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. However, a team that exerts too much control over individual members runs the risk of reducing creative interactions, resulting in tunnel vision. A team that exerts too little control,

2. Enter your footnote content here.

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 selecting a diverse group of team members deserves serious consideration.

DEVELOPING SUCCESSFUL TEAMS

Phases of Team Development

Various types of teams typically go through four stages of development: Forming, storming, norming, and performing. Let's view this short video for an overview of each stage before a more in-depth review of each stage.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=193#h5p-82

Forming: The first stage of team development is when individuals of a team first come together. Typically team members are polite with each other and attempt to get to know each other. Teams will discuss membership requirements, responsibilities, and size.

Storming: The second phase members will attempt to define roles and responsibilities. This stage is called storming because members may not yet know each other's preferences and communication styles, consequently, misunderstanding and conflict are common in this stage.

Norming: The team begins to function as a team in the third phase of team development. Here, tension subsides, roles are clarified, and information is shared. A collective sense of purpose is formed and team members begin to work together to achieve their goals.

Performing: For teams that complete the first three phases of team development reach phase four. In phase four, teams have developed loyalty, respect and perhaps friendships. In this phase, teams establish routines and are able to be productive.

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. If all the team members commit to filling a leadership role, however, the group will stall from the start 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 29.1 below captures some of these roles.

Table 12.1.1: 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 a recorder in high school because they thought that all they had to do what 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 29.2 below.

Table 12.1.2: Negative Group Roles[3]

3. (Beene & Sheats, 1948; McLean, 2005)

Role	Actions
Dominator	Dominates discussion so others can’t take their turn
Recognition seeker	Seeks attention by relating the 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

Whether a team member has a positive or negative effect often depends on the 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.[4]

Perhaps the worst of all roles is the slacker. If you consider a game of tug-of-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.

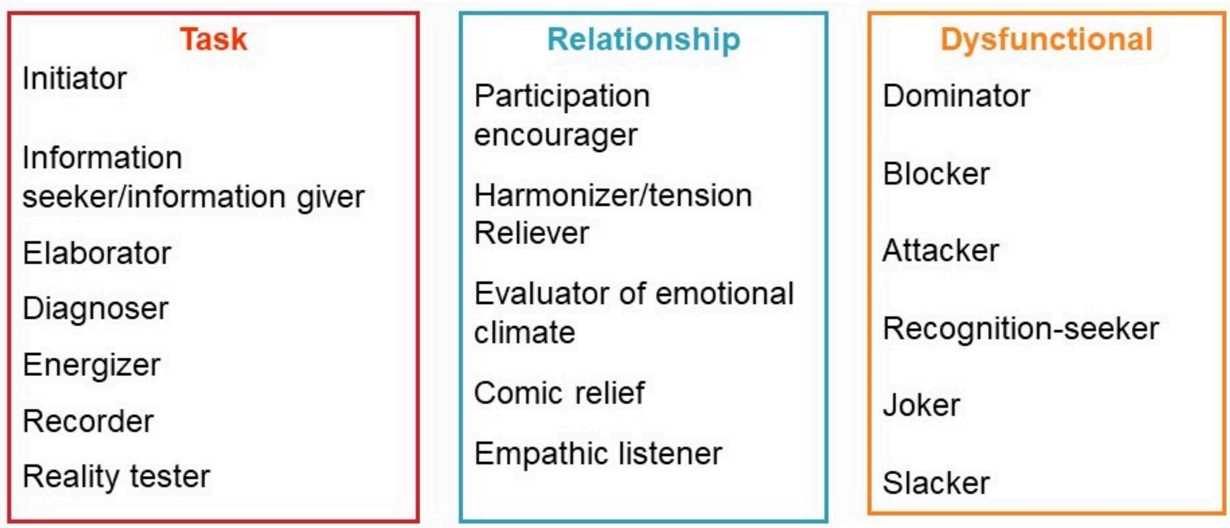

Figure 12.1.2: Categories of roles played by team members.

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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 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

4. (*Business Communication for Success*, 2015).

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[5]:

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)

Figure 12.1.3[6]

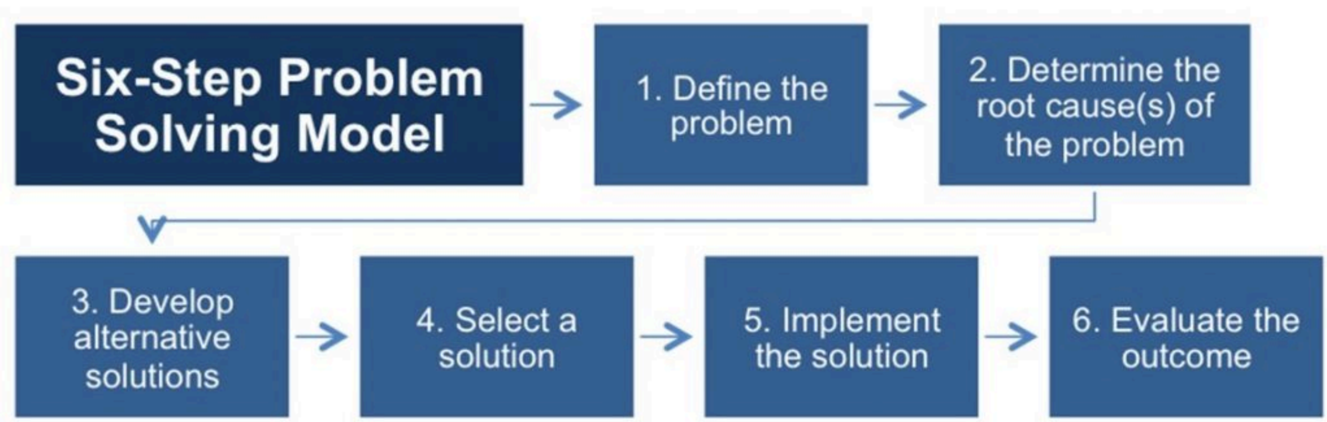


Figure 12.1.3: An illustration of the six steps to solving group problems

Let's discuss each step in detail.

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 important considerations that, if addressed might will help to successfully resolve the problem, will fall outside of the scope and guarantee failure.

5. (2005)
6. Free Management Books. (n.d.). The six step problem solving model. News. Retrieved from http://www.free-management-ebooks.com/news/six-step-problem-solving-model/

Analyze the Problem: The group must then analyzes the problem by figuring out its root causes so that the solution can address those rather than mere effects.

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.

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.

Decide on a Solution: They may have a number of possible solutions. However, only one solution can be implemented. Thus, the group should complete a cost-benefit analysis, which ranks each solution according to its probable impact. 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.

Implement the Solution: Now that the group had determined the solution, implementation is the next step. To encourage a "buy-in" to the solution, ensure the team is involved in the implementation. Remain flexible and open to possible unforeseen problems that may arise during the implementation process.

Follow Up on the Solution: Have a follow-up meeting about the determined solution. Ensure to restate the solution and establish a feedback mechanism that will promote ongoing dialogue if necessary.

A problem may have several dimensions as well as solutions, but resources can be limited and not every solution is successful. Even learning what doesn't work gives a team valuable intel and takes them one step closer to a solution. Altogether, the methodical approach serves as a useful guide through the problem-solving process that will eventually lead to success [7]

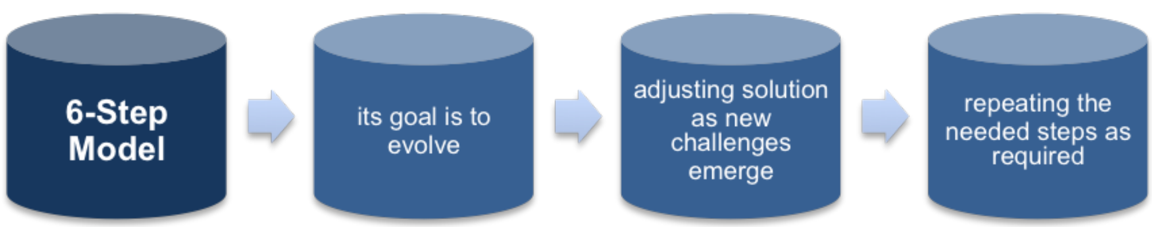


Figure 12.1.4: The six step process provides many advantages to teams including the model's flexibility.

LEADING TEAMS

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

7. (*Business Communication for Success*, 2015).

consider the leadership role you'll occupy as one whose success depends largely on communication skills.

Paths to Leadership

Whether or not there are natural born leaders who come 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.

Learn How to Manage People and be a Better Leader Video[8]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=193#h5p-84

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. If the appointed leader is accepted, the team will function to achieve designated tasks. However, the work environment is likely to be a toxic if the appointment is based on **cronyism** or **nepotism**. Such a group will be pulling their tug-o-war rope in divergent directions until a more respected leader is appointed

An **emergent leader** is 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. The emergent leader is favoured in any true **meritocracy**—i.e., where skill, talent, and experience trump other considerations.

Leadership Style

We can see types of leaders in action and draw on common experiences for examples. For good reason, the heart surgeon does not involve everyone democratically in the decision-making process

8. Workforce Singapore. (2013). Learn how to manage people and be a better leader [Video file]. Retrieved from https://www.youtube.com/watch?v=PWmhl6rzVpM

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 rules of conduct for the group. Although this type of leadership can be advantageous in certain situations, it certainly doesn't apply in most workplace situations.

Opposite the autocrat is the "live and let live" **laissez-faire leader**. In a professional setting, micromanaging employees is counter-productive. Employees know how to do their job, and have earned their role through time, effort, and experience. In such environments, A wise leader may choose to establish operating standards, overarching guidelines, and provide employees with the tools required to do their jobs.

We are not born leaders but may emerge into these roles if the context or environment requires our skill set. A **transactional** leader often occurs when someone has skills 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 **participatory leader** involves a central role of bringing people together for a common goal. This type of leader may set a vision, create benchmarks, and collaborate with a group. Whether it is a beautiful movement in music or a group of teams that comes together to address a common challenge, the participatory leader keeps the group on task as it moves towards its ultimate objective.

Coaches are often discussed in business-related books as models of leadership for good reason. A **transformational leader** 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 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 [9]

9. (*Business Communication for Success,* 2015).

Figure 29.5: A summary of the five types of leader. Different situations and work environments will call for different leadership style. Flexible is an important characteristic of effective leadership (Visual.ly, n.d.)

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. 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 a productive employee motivated to do good work in pursuit of even more praise and success.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=193#h5p-85

Constructive Criticism

Performing work of 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.

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.

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 lunch 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 the 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

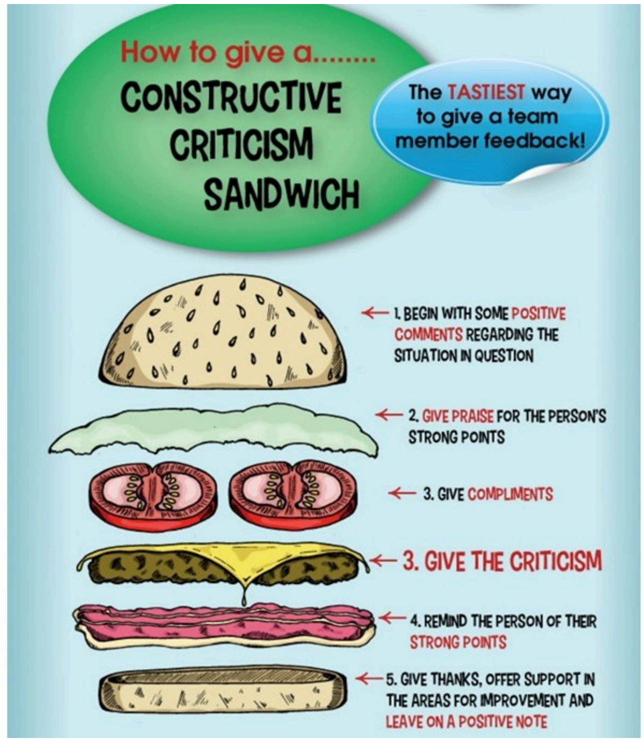
Once you understand the constructive criticism, paraphrase it aloud to confirm your understanding. "So you're basically saying that I should be doing X instead of Y, right?" If the speaker confirms your understanding, follow up by explaining how you're going to implement the advice to assure them that their efforts in speaking to you won't be in vain. Apologizing may even be necessary if you were clearly in the wrong.

Of course, if the constructive criticism isn't so constructive—if it's mere criticism, 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.

Giving "Hamburger 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. 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 "hamburger **sandwich**," (see figure 12.1.6[10]) usually said with a more vulgar alternative to "hamburger." 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 hamburger) 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, this one's organization divides into three parts as shown in Table 12.1.4 below.



12.1.6: The five steps involved in the "hamburger sandwich" feedback method

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 hamburger sandwich tends to make those receiving it feel good about themselves even as they're motivated to do better.

Communicating Bad News

How to Deliver Bad News at Work Video[11]

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=193#h5p-86

As the above video illustrates, not everyone is good at delivering bad news. The richness of the face-to-face channel makes it ideal for communicating bad news. As far as tasks go, however, few people enjoy either giving or receiving bad news this way. Since most people dislike conflict. 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.

Set 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?

10. Clker-Free-Vector-Images / 29597 Images. (2012, April 14). Cheeseburger meat bun cheese 34315. Retrieved from https://pixabay.com/en/cheeseburger-meat-bun-cheese-34315/
11. VitalSmarts Video. (2017). How to deliver bad news at work [Video file]. Retrieved from https://www.youtube.com/watch?v=z6pRXVbhlJk

A clear conceptualization of the goal allows you to anticipate the possible responses, plan ahead, and get your emotional "house" in order.

Set the right tone. 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.

Choose the right environment. 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.

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[12]

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 this unit) 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.

4. Think of a leader you admire and respect, someone who had or has authority over you. How did they become a leader? By appointment, democratic selection, or emergence? How would you characterize their leadership style? Are they autocratic, democratic or laissez-faire? Are they like a technician, conductor, or coach?

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

12. (*Business Communication for Success*, 2015).

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 8 a.m., 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 present 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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12.2 CONFLICT RESOLUTION STRATEGIES

Learning Objectives

After studying this unit, you will be able to

- rank several types of response to conflict in the workplace in order of most appropriate to least
- explain a collaborative approach to resolving workplace conflict

INTRODUCTION

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 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

Figure 30.1: Workplace conflict can be very costly (Short, 2016).

an entirely negative frame of reference, we should view it as an opportunity for clarification, learning, growth, and even reinforcement of the relationship.

CONFLICT RESOLUTION

Conflict arises everywhere communication occurs and can be very costly. 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. Conflict can be cognitive or affective. **Cognitive** conflict is productive and constructive. As we discussed, during the storming stage of team formation, there is often conflict. However, the conflict is focused on the tasks, responsibilities, and roles and often serves to clarify these variables and create a clearer vision for the team when the conflict is resolved. **Affective** conflict, however, is destructive. Here, disagreements are about personalities, personal choices, and feelings. This sort of conflict can lead to permanent group division and disharmony.

Five conflict resolution strategies are presented below.

Figure 30.2: Research on workplace conflict indicate the issues that fall within the affective issues area of conflict make up the largest percentage of workplace conflict (Short, 2016).

Competitive Style (Win/Lose): a desire to advance one's own concerns at the expense of the other party and to dominate. People with this style often resort to blaming or seeking a scapegoat rather than assuming responsibility. People with this style will also resort to threats.

Collaboration (Win/Win): desire to make both people happy. People who have this style are other oriented and view conflict as a set of problems to be solved. Collaboration is best used when those involved in the conflict need new, fresh ideas and perhaps a different direction.

Compromise (½ win, ½ lose): Parties meet somewhere in the middle. People who use this style find a solution that meets the needs of all concerned. When people compromise, they don't get exactly what they want. Each person gives up a bit of what he/she wants. Compromise can bring about quick solutions and reinforces equality.

Accommodate (Lose/Win): Desire to satisfy the other's concerns over one's own concerns. Therefore, people with this style will give in to the demand of others to avoid conflict, rejection, or disruption. Typically, people with this management style like to people please.

Avoidant: Party is indifferent to everyone's concerns including his/her own. 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.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=197#h5p-87

CONFLICT MANAGEMENT SKILLS

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 to conflict resolution can help lead to an amicable solution.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=197#h5p-88

Let's examine the conflict management options.

Confront and Problem Solve: The most effective manner of resolving a conflict is to address it directly. First, the true source of the conflict must be identified. The confrontation in this approach is gentle and tactful no combative and abusive. To ensure this strategy works, allow some time to pass between the conflict and problem-solving. An important advantage of this option is its focus on the issue that caused the conflict and not on the personalities involved in the conflict.

Reframing: Looking at a conflict from an alternative point of view helps to shed light on the causes of the conflict. **Cognitive restructuring** allows you to reframe the conflict and to gain insight into possible solutions. How you frame or choose your thoughts can determine the outcome of a conflict. Seeing the conflict from the other side allows you to also deal with the conflict in a positive way.

Appeal to Third Party: When there seems no path to a resolution, enlist the help of a third party with more power than you or the other parties in the conflict have. In many cases, simply suggesting that a third party will be contacted will encourage all parties to find their own resolution.

Negotiation: Conflicts often involve negotiations. Negotiations require that all parties are open to cooperating and to compromise. Negotiation takes place frequently in the workplace. The achieve the best negotiations: create a positive negotiating environment, practice active listening, be reasonable, focus on common ground, make a last and final offer, be tactful.

Conflicts are inevitable, but conflicts do not have to be dysfunctional. Understanding your conflict management style and possessing some conflict resolution skills will make you more effective in the work environment.

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 results? 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.

Previous

NEXT

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12.3 GROUP MEETINGS AND WEB CONFERENCING

Learning Objectives

After studying this unit, you will be able to

- explain the purpose and contents of the meeting agenda and minutes
- demonstrate best practices in web conferencing for professional situations

INTRODUCTION

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.

MEETING PREPARATION

Developing an 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. Before looking at the nitty-gritty of an agenda, let's review this video on why agendas are important.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=201#h5p-89

A well-developed agenda will contain 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 to 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).

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

Figure 31.1: A few important roles and their functions in a typical meeting (Birkenhagen, 2018).

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, 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.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=201#h5p-90

Distributing 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 at 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 afterward, 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.

Figure 31.2: Four tips to help you take effective and useful meeting minutes ([The Balance](), 2019).

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).

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 and telephone calls 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.

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 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 the noise and avoid intrusions like the one that embarrassed Prof. Robert Kelly during a live BBC News interview about South Korea.

A YouTube element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=201

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. The video below summarizes the video conferencing process.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=201#h5p-91

Key Takeaway

- Always ensure there is a reason to hold a meeting
- Ensure meetings are well planned by developing an agenda, assigning roles, and distributing meeting notes
- Update your understanding of the meeting held with the aid of audio/visual technology.

Previous

NEXT

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12.4 TOOLBOX MEETINGS

TIM CARSON

A toolbox meeting is an informal safety meeting, usually held on-site and before the official start of the day, which focuses on safety-related topics and issues. These issues can incidents which may have happened the prior day, or they may cover important specific safety topics (eg. Ladder use, PPE, Fire Safety, etc.), or workplace hazards that might be encountered that particular day.

Toolbox Meetings

Meetings are usually short in duration and are typically recorded through documentation. This documentation is usually referred to as a ‘Field Level Risk Assessment’ (FLRA) or a Site-Specific Safety Requirement (SSSR).

Toolbox meetings are an effective method for reviewing and refreshing common safety concerns as well as raising the safety awareness within a crew. They are designed as an information exchange where everyone participating can contribute their knowledge and experience.

Toolbox meetings are also designed to facilitate health and safety concerns on the job site and assist in promoting a company’s safety culture.

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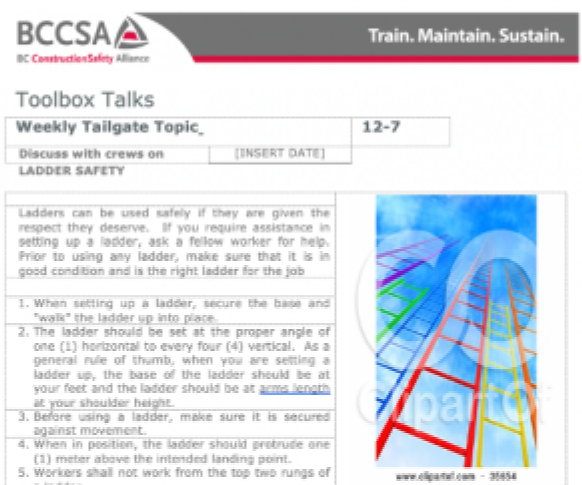
WorkSafe BC – Ladder Safety

An example of a document used for the purpose of a toolbox meeting may look like the following;



BCCSA
BC ConstructionSafety Alliance
Train. Maintain. Sustain.

Toolbox Talks

Weekly Tailgate Topic	12-7
Discuss with crews on [INSERT DATE]	

LADDER SAFETY

Ladders can be used safely if they are given the respect they deserve. If you require assistance in setting up a ladder, ask a fellow worker for help. Prior to using any ladder, make sure that it is in good condition and is the right ladder for the job

1. When setting up a ladder, secure the base and "walk" the ladder up into place.
2. The ladder should be set at the proper angle of one (1) horizontal to every four (4) vertical. As a general rule of thumb, when you are setting a ladder up, the base of the ladder should be at your feet and the ladder should be at arms length at your shoulder height.
3. Before using a ladder, make sure it is secured against movement.
4. When in position, the ladder should protrude one (1) meter above the intended landing point.
5. Workers shall not work from the top two rungs of a ladder.

www.clipartof.com · 35654

WorkSafeBC has an example page of toolbox items that might be included in a typical meeting. The following is an example of what topics may be included in a toolbox meeting;

WORKSAFEBC
WORKING TO MAKE A DIFFERENCE
worksafebc.com

TOOLBOX MEETING GUIDE

Toolbox meeting checklist

Choose a safety topic
- ❑ Choose a topic relevant to the work the crew is doing.

Be prepared
- ❑ Inspect the jobsite for hazards related to your topic.
- ❑ Read over the material you plan to cover.
- ❑ Make sure you are familiar with any regulations, guidelines and company rules related to the day's topic.
- ❑ Review reports of recent accidents on the site, including "near misses."

Get the crew actively involved in the meeting
- ❑ Choose a real-life example (case study) to talk about.
- ❑ Invite the crew to ask questions and make suggestions related to the topic.
- ❑ Respond to questions that you can answer, and offer to find answers you don't know.
- ❑ Allow time at the end of the meeting for questions and suggestions on any safety issue.
- ❑ Ask the crew for feedback about the meeting.
- ❑ Involve the crew in preparing for and/or leading future safety meetings.

Follow up
- ❑ Look into complaints, concerns, and suggestions that the crew brought up.
- ❑ Report back to the crew to let them know what will be done.
- ❑ Keep good records of each toolbox meeting.

More Than Stats…

The most recent statistics from the Association of Workers' Compensation Boards of Canada (AWCBC) tell us that in 2017, 951 workplace fatalities were recorded in Canada, an increase of 46 from the previous year. Among these deaths were 23 young workers aged 15-24.

Add to these fatalities the 251,508 accepted claims (an increase from 241,508 the previous year) for lost time due to a work-related injury or disease, including 31,441 from workers aged 15-24, and the fact that these statistics only include what is reported and accepted by the compensation boards, there is no doubt that the total number of workers impacted is even greater.

And it's not just these numbers on which we need to reflect. With each worker tragedy, there are loved ones, family members, friends, and co-workers who are directly affected, left behind, and deeply impacted – their lives also forever changed.[1]

Key Takeaways

Resources:

BC Construction Safety Alliance:

https://www.bccsa.ca/Toolbox-Talks-.html?

Canadian Centre for Occupational Health and Safety

https://www.ccohs.ca/

Canadian Centre for Occupational Health and Safety – Day of Mourning

https://www.ccohs.ca/events/mourning/

WorkSafeBC Toolbox Meeting Checklist:

https://www.worksafebc.com/en/resources/health-safety/toolbox-meeting-guides/construction-toolbox-meeting-checklist?lang=en

[1] Canadian Centre for Occupational Health and Safety – https://www.ccohs.ca/events/mourning/

CHAPTER 13: INTERPERSONAL COMMUNICATION

So far we've focused on writing and presentation skills in the workplace, but you can be a highly-skilled writer and speaker and still not be at the top of your profession. In a world gone mad for technology, we still value the human element of face-to-face interactions most. Though online shopping has stolen some of the retail market shares 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 interpersonal skills.

13.1 VERBAL COMMUNICATION AND CONVERSATION

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Learning Objectives

1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
2. Explain how to use your voice effectively in professional situations.
3. Identify the five stages of a conversation and general strategies for improving conversation skills.
4. 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[1], 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, 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

1. (Gillett, 2016)

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

Before diving into these topics, however, let's review what face-to-face meetings are all about according to the Table 13.1.3 channel selection guide above.

TABLE 13.1.3 (EXCERPT): IN-PERSON MEETINGS AT A GLANCE

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
In-person conversation	• 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	• 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	• 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	• 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

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[2]. 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.

2. (*Business Communication for Success*, 2015, 16.5)

How your voice quality, volume, and pitch affect your listener's understanding of the message's the 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[3]. 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[4]. For the sake of your future employability, then, let's focus on Conversation 101 by breaking down how we achieve goals through dialogue.

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.

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

3. (*Business Communication for Success, 2015*, 15.2)

4. (Mercer, Ahmed, & Warwick, 2014; McKenna, 2017)

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[5]. 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.

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 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.

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.

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

5. (Bradberry, 2016)

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. 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.

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.[6]

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. (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[7]. 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

6. (*Business Communication for Success*, 2015, 16.5).

7. (Andrew-Gee, 2018; Smith, Robinson, & Segal, 2018; Brandon, 2018)

to social competence and confidence, they enter the workforce in a state of arrested development. “Adulting” 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)]

An interactive or media element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=472

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.

An interactive or media element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=472

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.

An interactive or media element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=472

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")[8]. 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. (Ducharme, 2018)

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.
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[9]. If you add the following to Headlee's advice, you stand a good chance of improving your conversation skills.

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[10]. 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[11].

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

9. (TED, 2016)
10. (Chartrand & Bargh, 1999)
11. (Shellenbarger, 2016)

to pronounce the word correctly before using it in a formal interactive setting [12]. 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*).

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.

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.

12. (*Business Communication for Success*, 2015, 19.4)

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	• 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	• 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	• 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	• 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

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"[13]

TELEPHONE CONVERSATION ORGANIZATION

Recall from 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.

13. (Mayer, 1980, p. 21).

TABLE 10.1.4.2: FIVE-STAGE TELEPHONE CONVERSATION

Stage	Subevents	Example
1. Opening	• Both parties identify themselves • They exchange greetings	• [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	• Substance of conversation • Parties exchange roles	• **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	• Substance of conversation • Parties exchange roles	• **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	• Signal that business is concluded	• **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	• Both parties say goodbye	• **Val:** Yes, I will. Have a good weekend, Ken. • **Ken:** You too, Val. Bye. • **Val:** Take care. • [they hang up]

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[14] 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.

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.

14. (*Business Communication for Success*, 2015, 15.2).

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13.2 NON-VERBAL COMMUNICATION

Learning Objectives

After reviewing this information, you will be able to

- understand and explain the principles of nonverbal communication
- understand general types of nonverbal communication
- understand the principles of active listening

INTRODUCTION

It's not always what you say, but how you say it that makes a difference. We sometimes call this "body language," or "nonverbal communication," and it is a key aspect of effective business communication. Nonverbal communication is the process of conveying a message without the use of words. It can include gestures and facial expressions, tone of voice, timing, posture and where you stand as you communicate. It can help or hinder the clear understanding of your message, but it doesn't reveal (and can even mask) what you are really thinking. Nonverbal communication is far from simple, and learning how to understand non-verbal skills will increase your effectiveness as a business communicator.

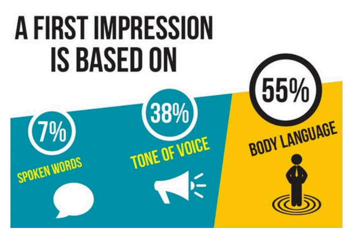

Figure 13.2.1: Nonverbal communication makes up 93% of our communication. (Steemit, 2017)

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TYPES OF NON-VERBAL COMMUNICATION

How do you know when your boss or instructors are pleased with your progress (or not)? You might know from the smiles on their faces, from the time and attention they give you, or perhaps in other nonverbal ways, like a raise, a bonus, or a good grade. Whether the interaction takes place face-to-face, or at a distance, you can still experience and interpret nonverbal responses. Eight types of non-verbal communication are discussed below.

1. Body language

Body language is the way people situate their body naturally depending on the situation, the environment and how they are feeling. Different forms of body language include gestures, eye contact, posture and facial expressions. For example, think of all the times your parents have told you to stand up straight. The way you sit or stand communicates your comfort level, professionalism and general disposition towards a person or conversation. The image below explains the nonverbal cues communicated by each posture displayed.

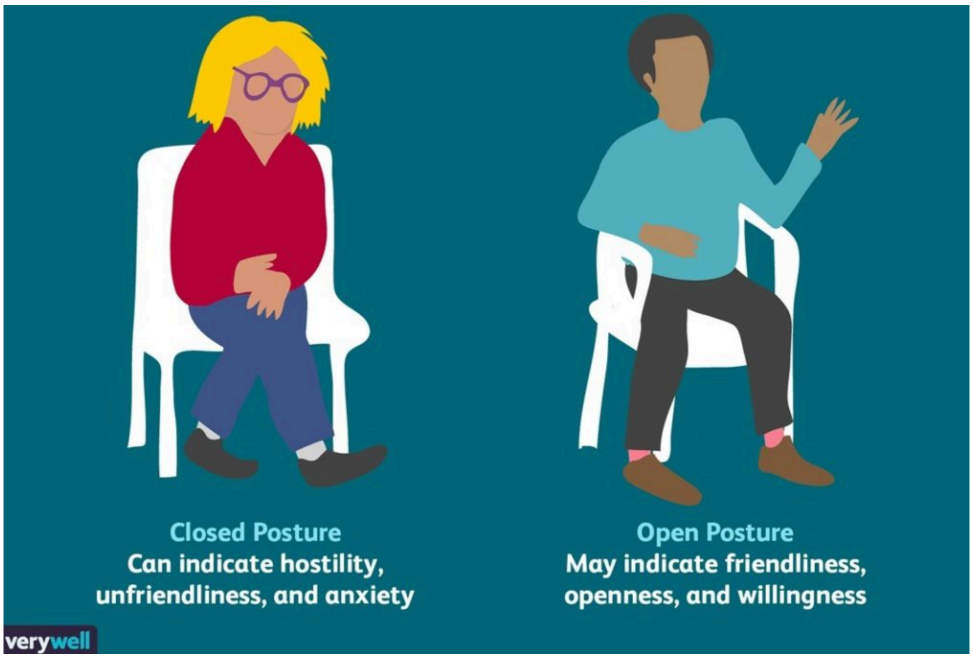

Figure 13.2.2: Image illustrates the non-verbal messages these two different postures communicate. (Verywell, 2017)

Numerous gestures are possible, and each gesture conveys something different. The range of possibilities is one of the reasons non-verbal communication is so complex. Review Figure 13.2.3 for a number of common gestures and their meaning.

Gesture	Meaning
Emblems	Gestures that can easily be translated to word. For example, waving to say hello or good-bye.
Illustrators	Behaviours the support the spoken word. For example, wagging your finger while saying no.
Affect Display	Gestures that display emotion, for example, a smile.
Regulators	Gestures that control interaction, such a leaning forward or backwards to signal interest.
Adaptors	Gestures that indicate tension. For example, tapping your feet before the beginning of a test.

Figure 13.2.3: Five types of gestures explained. (Communicating for Results, 2018)

2. Space or Proxemics

The amount of space that exists between yourself and others communicates your comfort level, the importance of the conversation, your desire to support or connect with others, and the relative degree of power you hold. Space can be categorized into intimate, personal, social, and public. Review the image below for an overview of these categories.

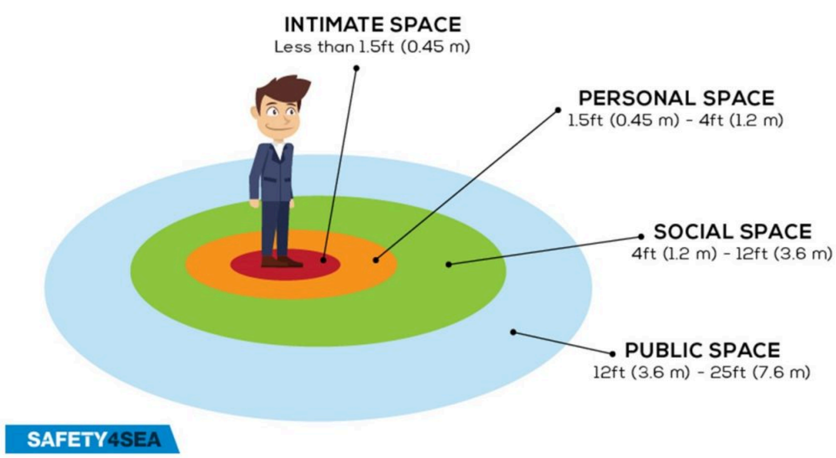

Figure 13.2.4: The delineation of four territorial zones. Each zone an indication of the comfort level during a conversation or interaction. ([Safety4sea,](#) 2020)

3. Paralanguage:

Paralanguage includes the non-language elements of speech, such as your talking speed, pitch, intonation, volume and more. The saying "the meaning is in the person not in the words" applies here. Becoming an effective speaker involves understanding how to maximize and manage the specific qualities of your voice to clearly articulate your words and ideas.

4. Time or Chronemics

For business professionals, time is a valuable resource. Over the years, time has become a commodity. The saying "time is money" is very true for many professions, businesses, and cultures. How long it takes to complete an action, how punctual a person is, how long someone will listen or wait for a reply communicates their relative importance.

5. Physical Characteristics

You didn't choose your genes, your eye color, the natural color of your hair, or your height, but people spend millions every year trying to change their physical characteristics. You can get colored contacts; dye your hair; and if you are shorter than you'd like to be, buy shoes to raise your stature a couple of inches. Although some may find it superficial, the way we look affects the way we feel and how others perceive us. Research shows that we tend to think more positively of people deemed attractive. The work environment is no different. Take care that you are communicating the message you desire by cultivating your professional attire and look.

6. Touch

Touch is the most powerful form of nonverbal communication. Research shows that intimate contact is critical to the understanding of our own humanity. Over the last few years, the understanding of what is considered appropriate touching in the work environment is changing. Thus, although touch is of paramount importance, if inappropriate, it also carries the potential for the most problems.

7. Artifacts

Do you cover your tattoos when you are at work? Do you know someone who does? Expectations vary a great deal, and body art or tattoos may still be controversial in the workplace. Artifacts are forms of decorative ornamentation that are chosen to represent self-concept. They can include rings and tattoos, but may also include clothes, cars, watches, briefcases, purses, and even eyeglasses. Artifacts may project gender, role or position, class or status, personality, and group membership or affiliation. Paying attention to a customer's artifacts may allow you to more accurately adapt your message to meet their needs.

8. Environment

Environment involves the physical and psychological aspects of the communication context. More than the tables and chairs in an office, the environment is an important part of the dynamic communication process. The perception of one's environment influences one's reaction to it. For example, Google is famous for its work environment, with spaces created for physical activity and even in-house food service around the clock. The expense is no doubt considerable, but Google's actions speak volumes. In Google's view, the results produced in the environment, designed to facilitate creativity, interaction, and collaboration, are worth the effort.

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DEVELOPING YOUR NON-VERBAL COMMUNICATION SKILLS

Nonverbal communication is an important aspect of business communication, from the context of interpersonal interaction to a public presentation. It is a dynamic, complex, and challenging aspect of communication. You are never done learning and adapting to your environment and context, and improving your understanding of nonverbal communication comes with the territory.

In order to be a successful business communicator, you will need to continually learn about nonverbal communication and its impact on your interactions. Below are three ways to develop your nonverbal communication skills.

WATCH REACTIONS

Market research is fundamental to success in business and industry. So, too, you will need to do a bit of field research to observe how, when, and why people communicate the way they do. If you want to be able to communicate effectively with customers, you will need to anticipate not only their needs, but also how they communicate. They are far more likely to communicate with someone whom they perceive as being like them, than with a perceived stranger. From dress to mannerisms and speech patterns, you can learn from your audience how to be a more effective business communicator.

ENROLL AN OBSERVER

Most communication in business and industry involves groups and teams, even if the interpersonal context is a common element. Enroll a coworker or colleague in your effort to learn more about your audience, or even yourself. They can observe you and note areas you may not have noticed that could benefit from revision. Perhaps the gestures you make while speaking tend to distract rather than enhance your communication. You can also record a video of yourself speaking with someone and play it to get a sense of how your nonverbal communication complements or detracts from the message.

FOCUS ON A SPECIFIC TYPE OF NONVERBAL COMMUNICATION

What is the norm for eye contact where you work? Does this change or differ based on gender, age, ethnicity, cultural background, context, environment? Observation will help you learn more about how people communicate; looking for trends across a specific type of nonverbal communication can be an effective strategy. Focus on one behaviour you exhibit, like pacing, hand gestures, or eye contact. Use nonverbal communication to enhance your message, watch reactions and consider enrolling an observer to help you become aware of your nonverbal habits and how your others receive nonverbal messages.

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ACTIVE LISTENING

You may have experienced the odd sensation of driving somewhere and, having arrived, have realized you don't remember driving. Your mind may have been filled with other issues, and you drove on autopilot. It's dangerous when you drive on auto-pilot; similarly communicating on auto-pilot is also dangerous. Choosing to listen attentively takes effort. People communicate with words, expressions, and even in silence, and your attention to them will make you a better communicator. From discussions on improving customer service to retaining customers in challenging economic times, the importance of **active listening** comes up frequently as a success strategy.

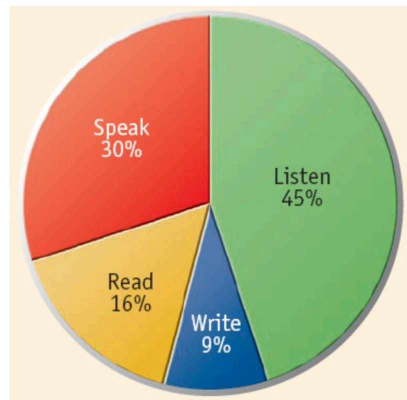

Figure 43.5: A breakdown of time typically sent on each communication skill in an average workday. (Communication: Principles for a Lifetime, 2005)

There are five steps in the listening process: **selecting**, **attending**, **understanding, remembering,** and **responding**.

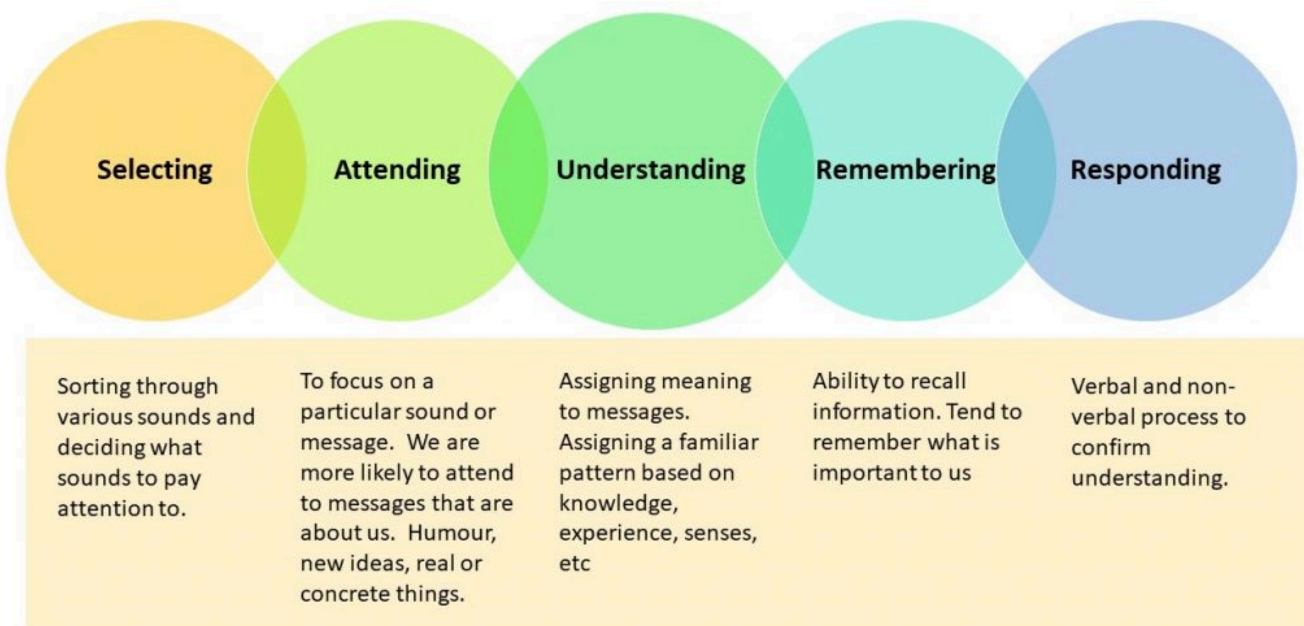

Figure 13.2.6: The steps in the listening process. (Adapted from Communication: Principles for a Lifetime, 2005)

Here are some tips to facilitate active listening:

- Maintain eye contact with the speaker
- Don't interrupt
- Focus your attention on the message, not your internal monologue.
- Restate the message in your own words and ask if you understood correctly.
- Ask clarifying questions to communicate interest and gain insight.

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Our previous tips will serve you well in daily interactions, but suppose you have an especially difficult subject to discuss. In difficult situations, make an extra effort to create an environment that will facilitate positive communication.

Here are some tips that may be helpful:

- **Set aside a special time**. To have a difficult conversation, set aside time when you will not be disturbed.
- **Don't interrupt**. Keep silent while you let the other person speak.
- **Be nonjudgmental**. Receive the message without judgment or criticism. Set aside your opinions, attitudes, and beliefs.
- **Be accepting**. Be open to the message being communicated, realizing that acceptance does not necessarily mean you agree with what is being said.
- **Take turns**. Wait until it is your turn to respond, and then measure your response in proportion to the message that was delivered to you. Reciprocal turn-taking allows each person have his say.
- **Acknowledge**. Let the other person know that you have listened to the message attentively.
- **Understand**. Be certain that you understand what the other person is saying. If you don't understand, ask for clarification. Restate the message in your own words.
- **Keep your cool**. Speak your truth without blame. A calm tone will help prevent the conflict from escalating. Use "I" statements (e.g., "I felt concerned when I learned that my department is going to have a layoff") rather than "you" statements (e.g., "you want to get rid of some of our best people").

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CONCLUSION

Recognize that mutual respect and understanding are built one conversation at a time. Trust is difficult to gain and easy to lose. Be patient and keep the channels of communication open, as a solution may develop slowly over the course of many small interactions. Recognize that it is more valuable to maintain the relationship over the long term than to "win" in an individual transaction.

Exercises

1. Choose a television personality you admire. What do you like about this person? Watch several minutes of this person with the sound turned off, and make notes of the nonverbal expressions you observe. Turn the sound back on and make notes of their tone of voice, timing, and other audible expressions.
2. Create a survey that addresses the issue of which people trust more, nonverbal or verbal messages. Ask an equal number of men and women and compare your results with those of your classmates.

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13.3 THE LISTENING PROCESS

ASHLEYORME

THE LISTENING PROCESS

We begin to engage with the listening process long before we engage in any recognizable verbal or nonverbal communication. It is only after listening for months as infants that we begin to consciously practice our own forms of expression. In this section we will learn more about each stage of the listening process, the main types of listening, and the main listening styles.

Listening is a process and as such doesn't have a defined start and finish. Like the communication process, listening has cognitive, behavioral, and relational elements and doesn't unfold in a linear, step-by-step fashion. Models of processes are informative in that they help us visualize specific components, but keep in mind that they do not capture the speed, overlapping nature, or overall complexity of the actual process in action. The stages of the listening process are receiving, interpreting, recalling, evaluating, and responding.

RECEIVING

Before we can engage other steps in the listening process, we must take in stimuli through our senses. In any given communication encounter, it is likely that we will return to the receiving stage many times as we process incoming feedback and new messages. This part of the listening process is more physiological than other parts, which include cognitive and relational elements. We primarily take in information needed for listening through auditory and visual channels. Although we don't often think about visual cues as a part of listening, they influence how we interpret messages. For example, seeing a person's face when we hear their voice allows us to take in nonverbal cues from facial expressions and eye contact. The fact that these visual cues are missing in e-mail, text, and phone interactions presents some difficulties for reading contextual clues into meaning received through only auditory channels.

It is important to consider noise as a factor that influences how we receive messages. Some noise interferes primarily with hearing, which is the physical process of receiving stimuli through internal and external components of the ears and eyes, and some interferes with listening, which is the cognitive process of processing the stimuli taken in during hearing. While hearing leads to listening, they are not the same thing. Environmental noise such as other people talking, the sounds of traffic, and music interfere with the physiological aspects of hearing. Psychological noise like stress and anger interfere primarily with the cognitive processes of listening. We can enhance our ability to receive, and in turn listen, by trying to minimize noise.

Julian Treasure gives us 5 Ways to Listen Better in his TedTalk below.

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INTERPRETING

During the interpreting stage of listening, we combine the visual and auditory information we receive and try to make meaning out of that information. The interpreting stage engages cognitive and relational processing as we take in informational, contextual, and relational cues and try to connect them in meaningful ways to previous experiences. It is through the interpreting stage that we may begin to understand the stimuli we have received. When we understand something, we are able to attach meaning by connecting information to previous experiences. If we have difficulty interpreting information, meaning we don't have previous experiences or information to make sense of it, then it is difficult to transfer the information into our long-term memory for later recall. In situations where understanding the information we receive isn't important or isn't a goal, this stage may be fairly short or even skipped. After all, we can move something to our long-term memory by repetition and then later recall it without ever having understood it. I remember earning perfect scores on exams in my anatomy class in college because I was able to memorize and recall, for example, all the organs in the digestive system. In fact, I might still be able to do that now over a decade later. But neither then nor now could I tell you the significance or function of most of those organs, meaning I didn't really get to a level of understanding but simply stored the information for later recall.

RECALLING

Our ability to recall information is dependent on some of the physiological limits of how memory works. Overall, our memories are known to be fallible. We forget about half of what we hear immediately after hearing it, recall 35 percent after eight hours, and recall 20 percent after a day. Our memory consists of multiple "storage units," including sensory storage, short-term memory, working memory, and long-term memory (Hargie, 2011).

Our sensory storage is very large in terms of capacity but limited in terms of length of storage. We can hold large amounts of unsorted visual information but only for about a tenth of a second. By comparison, we can hold large amounts of unsorted auditory information for longer—up to four seconds. This initial memory storage unit doesn't provide much use for our study of communication, as these large but quickly expiring chunks of sensory data are primarily used in reactionary and instinctual ways.

As stimuli are organized and interpreted, they make their way to short-term memory where they either expire and are forgotten or are transferred to long-term memory. Short-term memory a mental storage capability that can retain stimuli for twenty seconds to one minute. Long-term memory a mental storage capability to which stimuli in short-term memory can be transferred if they are connected to existing information. Once there, they can be stored indefinitely (Hargie, 2011). Working memory is a temporarily accessed memory storage space that is activated during times of high cognitive demand. When using working memory, we can temporarily store information and process and use it at the same time. This is different from our typical memory function in that information usually has to make it to long-term memory before we can call it back up to apply to a current situation. People with good working memories are able to keep recent information in mind and process it and apply it to other incoming information. This can be very useful during high-stress situations. A person in control of a command center like the White House Situation Room should have a good working memory in order to take in, organize, evaluate, and then immediately use new information instead of having to wait for that information to make it to long-term memory and then be retrieved and used.

Although recall is an important part of the listening process, there isn't a direct correlation between being good at recalling information and being a good listener. Some people have excellent memories and recall abilities and can tell you a very accurate story from many years earlier during a situation in which they should actually be listening and not showing off their recall abilities. Recall is an important part of the listening process because it is most often used to assess listening abilities and effectiveness. Many quizzes and tests in school are based on recall and are often used to assess how well students comprehended information presented in class, which is seen as an indication of how well they listened. When recall is our only goal, we excel at it. Experiments have found that people can memorize and later recall a set of faces and names with near 100 percent recall when sitting in a quiet lab and asked to do so. But throw in external noise, more visual stimuli, and multiple contextual influences, and we can't remember the name of the person we were just introduced to one minute earlier. Even in interpersonal encounters, we rely on recall to test whether or not someone was listening. Imagine that Azam is talking to his friend Belle, who is sitting across from him in a restaurant booth. Azam, annoyed that Belle keeps checking her phone, stops and asks, "Are you listening?" Belle inevitably replies, "Yes," since we rarely fess up to our poor listening habits, and Azam replies, "Well, what did I just say?"

EVALUATING

When we evaluate something, we make judgments about its credibility, completeness, and worth. In terms of credibility, we try to determine the degree to which we believe a speaker's statements are correct and/or true. In terms of completeness, we try to "read between the lines" and evaluate the message in relation to what we know about the topic or situation being discussed. We evaluate the worth of a message by making a value judgment about whether we think the message or idea is good/bad, right/wrong, or desirable/undesirable. All these aspects of evaluating require critical thinking skills, which we aren't born with but must develop over time through our own personal and intellectual development.

Studying communication is a great way to build your critical thinking skills, because you learn much more about the taken-for-granted aspects of how communication works, which gives you tools to analyze and critique messages, senders, and contexts. Critical thinking and listening skills also help you take a more proactive role in the communication process rather than being a passive receiver of messages that may not be credible, complete, or worthwhile. One danger within the evaluation stage of listening is to focus your evaluative lenses more on the speaker than the message. This can quickly become a barrier to effective listening if we begin to prejudge a speaker based on his or her identity or characteristics rather than on the content of his or her message.

RESPONDING

Responding entails sending verbal and nonverbal messages that indicate attentiveness and understanding or a lack thereof. From our earlier discussion of the communication model, you may be able to connect this part of the listening process to feedback. Later, we will learn more specifics about how to encode and decode the verbal and nonverbal cues sent during the responding stage, but we all know from experience some signs that indicate whether a person is paying attention and understanding a message or not.

We send verbal and nonverbal feedback while another person is talking and after they are done. Verbal and nonverbal signals we send while someone is talking, which can consist of verbal cues like "uh-huh," "oh," and "right," and/or nonverbal cues like direct eye contact, head nods, and leaning forward. Back-channel cues are generally a form of positive feedback that indicates others are actively listening. People also send cues intentionally and unintentionally that indicate they aren't listening. If another person is looking away, fidgeting, texting, or turned away, we will likely interpret those responses negatively.

Reflection is a responding behavior that can also show that you understand what was communicated. When you reflect a message, you state back what you heard the speakers say in your own words. For example, you might say the following to start off a reflective response: "What I heard you say was…" or "It seems like you're saying…" You can also ask clarifying questions to get more information. It is often a good idea to pair a paraphrase with a question to keep a conversation flowing. For example, you might pose the following reflection and question pair: "It seems like you believe you were treated unfairly. Is that right?" Or you might ask a standalone question like "What did your boss do that made you think he was 'playing favorites?'" Make sure to reflect and/or ask questions once a person's turn is over, because interrupting can also be interpreted as a sign of not listening. Reflection is also a good tool to use in computer-mediated communication, especially since miscommunication can occur due to a lack of nonverbal and other contextual cues.

13.4 LISTENING TYPES

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LISTENING TYPES

Listening serves many purposes, and different situations require different types of listening. The type of listening we engage in affects our communication and how others respond to us. For example, when we listen to empathize with others, our communication will likely be supportive and open, which will then lead the other person to feel "heard" and supported and hopefully view the interaction positively [1]. The main types of listening we will discuss are discriminative, informational, critical, and empathetic[2]

DISCRIMINATIVE LISTENING

Discriminative listening a focused and usually instrumental type of listening that is primarily physiological and occurs mostly at the receiving stage of the listening process. Here we engage in listening to scan and monitor our surroundings in order to isolate particular auditory or visual stimuli. For example, we may focus our listening on a dark part of the yard while walking the dog at night to determine if the noise we just heard presents us with any danger. Or we may look for a particular nonverbal cue to let us know our conversational partner received our message[3]. In the absence of a hearing impairment, we have an innate and physiological ability to engage in discriminative listening. Although this is the most basic form of listening, it provides the foundation on which more intentional listening skills are built. This type of listening can be refined and honed. Think of how musicians, singers, and mechanics exercise specialized discriminative listening to isolate specific aural stimuli and how actors, detectives, and sculptors discriminate visual cues that allow them to analyze, make meaning from, or recreate nuanced behavior[4].

INFORMATIONAL LISTENING

Informational listening is listening with the goal of comprehending and retaining information. This type of listening is not evaluative and is common in teaching and learning contexts ranging from a

1. (Bodie & Villaume, 2003)
2. (Watson, Barker & Weaver, 1995).
3. (Hargie, 2011)
4. (Wolvin & Coakley, 1993)

student listening to an informative speech to an out-of-towner listening to directions to the nearest gas station. We also use informational listening when we listen to news reports, voice mail, and briefings at work. Since retention and recall are important components of informational listening, good concentration and memory skills are key. These also happen to be skills that many college students struggle with, at least in the first years of college, but will be expected to have mastered once they get into professional contexts. In many professional contexts, informational listening is important, especially when receiving instructions. I caution my students that they will be expected to process verbal instructions more frequently in their profession than they are in college. Most college professors provide detailed instructions and handouts with assignments so students can review them as needed, but many supervisors and managers will expect you to take the initiative to remember or record vital information. Additionally, many bosses are not as open to questions or requests to repeat themselves as professors are.

CRITICAL LISTENING

Critical listening entails listening with the goal of analyzing or evaluating a message based on information presented verbally and information that can be inferred from context. A critical listener evaluates a message and accepts it, rejects it, or decides to withhold judgment and seek more information. As constant consumers of messages, we need to be able to assess the credibility of speakers and their messages and identify various persuasive appeals and faulty logic. Critical listening is important during persuasive exchanges, but I recommend always employing some degree of critical listening, because you may find yourself in a persuasive interaction that you thought was informative. Critical-listening skills are useful when listening to a persuasive speech and when processing any of the persuasive media messages we receive daily. You can see judges employ critical listening, with varying degrees of competence, on talent competition shows like *Rupaul's Drag Race*, *America's Got Talent*, and *The Voice*. While the exchanges between judge and contestant on these shows is expected to be subjective and critical, critical listening is also important when listening to speakers that have stated or implied objectivity, such as parents, teachers, political leaders, doctors, and religious leaders.

EMPATHETIC LISTENING

Empathetic listening is the most challenging form of listening and occurs when we try to understand or experience what a speaker is thinking or feeling. Empathetic listening is distinct from sympathetic listening. While the word *empathy* means to "feel into" or "feel with" another person, *sympathy* means to "feel for" someone. Sympathy is generally more self-oriented and distant than empathy[5]. Empathetic listening is other oriented and should be genuine. Because of our own centrality in our perceptual world, empathetic listening can be difficult. It's often much easier for us to tell our own story or to give advice than it is to really listen to and empathize with someone else. We should keep in mind that sometimes others just need to be heard and our feedback isn't actually desired.

Dylan Marron discusses key components of empathy in his Ted Talk Empathy is Not Endorsement.

5. (Bruneau, Wolvin & Coakley, 1993)

A YouTube element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=546

13.5 LISTENING STYLES

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LISTENING STYLES

Just as there are different types of listening, there are also different styles of listening. People may be categorized as one or more of the following listeners: people-oriented, action-oriented, content-oriented, and time-oriented listeners. Research finds that 40 percent of people have more than one preferred listening style, and that they choose a style based on the listening situation[1] Other research finds that people often still revert back to a single preferred style in times of emotional or cognitive stress, even if they know a different style of listening would be better[2]. Following a brief overview of each listening style, we will explore some of their applications, strengths, and weaknesses.

- **People-oriented listeners** are concerned about the needs and feelings of others and may get distracted from a specific task or the content of a message in order to address feelings.
- **Action-oriented listeners** prefer well-organized, precise, and accurate information. They can become frustrated when they perceive communication to be unorganized or inconsistent, or a speaker to be "long-winded."
- **Content-oriented listeners** are analytic and enjoy processing complex messages. They like in-depth information and like to learn about multiple sides of a topic or hear multiple perspectives on an issue. Their thoroughness can be difficult to manage if there are time constraints.
- **Time-oriented listeners** are concerned with completing tasks and achieving goals. They do not like information perceived as irrelevant and like to stick to a timeline. They may cut

1. (Bodie & Villaume, 2003).
2. (Worthington, 2003)

people off and make quick decisions (taking short cuts or cutting corners) when they think they have enough information.

PEOPLE-ORIENTED LISTENERS

People-oriented listeners are concerned about the emotional states of others and listen with the purpose of offering support in interpersonal relationships. People-oriented listeners can be characterized as "supporters" who are caring and understanding. These listeners are sought out because they are known as people who will "lend an ear." They may or may not be valued for the advice they give, but all people often want is a good listener. This type of listening may be especially valuable in interpersonal communication involving emotional exchanges, as a person-oriented listener can create a space where people can make themselves vulnerable without fear of being cut off or judged. People-oriented listeners are likely skilled empathetic listeners and may find success in supportive fields like counseling, social work, or nursing.

ACTION-ORIENTED LISTENERS

Action-oriented listeners focus on what action needs to take place in regards to a received message and try to formulate an organized way to initiate that action. These listeners are frustrated by disorganization, because it detracts from the possibility of actually doing something. Action-oriented listeners can be thought of as "builders"—like an engineer, a construction site foreperson, or a skilled project manager. This style of listening can be very effective when a task needs to be completed under time, budgetary, or other logistical constraints. One research study found that people prefer an action-oriented style of listening in instructional contexts (Imhof, 2004). In other situations, such as interpersonal communication, action-oriented listeners may not actually be very interested in listening, instead taking a "What do you want me to do?" approach. A friend and colleague of mine who exhibits some qualities of an action-oriented listener once told me about an encounter she had with a close friend who had a stillborn baby. My friend said she immediately went into "action mode." Although it was difficult for her to connect with her friend at an emotional/empathetic level, she was able to use her action-oriented approach to help out in other ways as she helped make funeral arrangements, coordinated with other family and friends, and handled the details that accompanied this tragic emotional experience. As you can see from this example, the action-oriented listening style often contrasts with the people-oriented listening style.

CONTENT-ORIENTED LISTENERS

Content-oriented listeners like to listen to complex information and evaluate the content of a message, often from multiple perspectives, before drawing conclusions. These listeners can be thought of as "learners," and they also ask questions to solicit more information to fill out their understanding of an issue. Content-oriented listeners often enjoy high perceived credibility because of their thorough, balanced, and objective approach to engaging with information. Content-oriented listeners are likely skilled informational and critical listeners and may find success in academic careers in the humanities, social sciences, or sciences. Ideally, judges and politicians would also possess these characteristics.

TIME-ORIENTED LISTENERS

Time-oriented listeners are more concerned about time limits and timelines than they are with the content or senders of a message. These listeners can be thought of as "executives," and they tend to actually verbalize the time constraints under which they are operating.

For example, a time-oriented supervisor may say the following to an employee who has just entered his office and asked to talk: "Sure, I can talk, but I only have about five minutes." These listeners may also exhibit nonverbal cues that indicate time and/or attention shortages, such as looking at a clock, avoiding eye contact, or nonverbally trying to close down an interaction. Time-oriented listeners are also more likely to interrupt others, which may make them seem insensitive to emotional/personal needs. People often get action-oriented and time-oriented listeners confused. Action-oriented listeners would be happy to get to a conclusion or decision quickly if they perceive that they are acting on well-organized and accurate information. They would, however, not mind taking longer to reach a conclusion when dealing with a complex topic, and they would delay making a decision if the information presented to them didn't meet their standards of organization. Unlike time-oriented listeners, action-oriented listeners are not as likely to cut people off (especially if people are presenting relevant information) and are not as likely to take short cuts.

13.6 BARRIERS TO EFFECTIVE LISTENING

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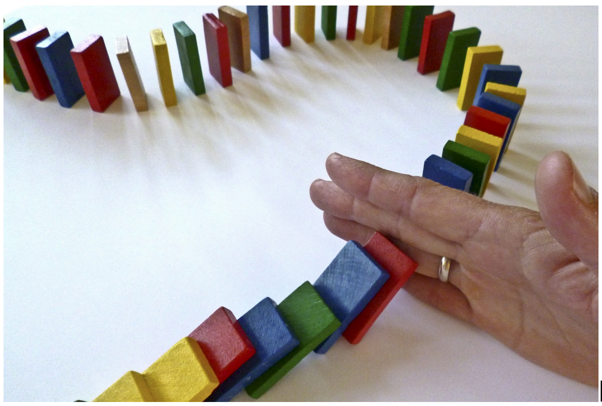BARRIERS TO EFFECTIVE LISTENING

Barriers to effective listening are present at every stage of the listening process [1] At the receiving stage, noise can block or distort incoming stimuli. At the interpreting stage, complex or abstract information may be difficult to relate to previous experiences, making it difficult to reach understanding. At the recalling stage, natural limits to our memory and challenges to concentration can interfere with remembering. At the evaluating stage, personal biases and prejudices can lead us to block people out or assume we know what they are going to say. At the responding stage, a lack of paraphrasing and questioning skills can lead to misunderstanding. In the following section, we will explore how environmental and physical factors, cognitive and personal factors, and bad listening practices present barriers to effective listening.

ENVIRONMENTAL, PHYSICAL, AND PSYCHOLOGICAL BARRIERS TO LISTENING

Environmental noise, such as lighting, temperature, and furniture affect our ability to listen. A room that is too dark can make us sleepy, just as a room that is too warm or cool can raise awareness of our physical discomfort to a point that it is distracting. Some seating arrangements facilitate listening, while others separate people. In general, listening is easier when listeners can make direct eye contact with and are in close physical proximity to a speaker. The ability to effectively see and

1. (Hargie, 2011).

hear a person increases people's confidence in their abilities to receive and process information. Eye contact and physical proximity can still be affected by noise. Environmental noises such as a whirring air conditioner, barking dogs, or a ringing fire alarm can obviously interfere with listening despite direct lines of sight and well-placed furniture.

Physiological noise, like environmental noise, can interfere with our ability to process incoming information. This is considered a physical barrier to effective listening because it emanates from our physical body. Physiological noise is noise stemming from a physical illness, injury, or bodily stress. Ailments such as a cold, a broken leg, a headache, or a poison ivy outbreak can range from annoying to unbearably painful and impact our listening relative to their intensity. Another type of noise, psychological noise, bridges physical and cognitive barriers to effective listening.

Psychological noise, or noise stemming from our psychological states including moods and level of arousal, can facilitate or impede listening. Any mood or state of arousal, positive or negative, that is too far above or below our regular baseline creates a barrier to message reception and processing. The generally positive emotional state of being in love can be just as much of a barrier as feeling hatred. Excited arousal can also distract as much as anxious arousal. Stress about an upcoming events ranging from losing a job, to having surgery, to wondering about what to eat for lunch can overshadow incoming messages. Cognitive limits, a lack of listening preparation, difficult or disorganized messages, and prejudices can also interfere with listening. Whether you call it multitasking, daydreaming, glazing over, or drifting off, we all cognitively process other things while receiving messages.

DIFFERENCE BETWEEN SPEECH AND THOUGHT RATE

Our ability to process more information than what comes from one speaker or source creates a barrier to effective listening. While people speak at a rate of 125 to 175 words per minute, we can process between 400 and 800 words per minute[2].[3]This gap between speech rate and thought rate gives us an opportunity to side-process any number of thoughts that can be distracting from a more important message. Because of this gap, it is impossible to give one message our "undivided attention," but we can occupy other channels in our minds with thoughts related to the central message. For example, using some of your extra cognitive processing abilities to repeat, rephrase, or reorganize messages coming from one source allows you to use that extra capacity in a way that reinforces the primary message.

The difference between speech and thought rate connects to personal barriers to listening, as personal concerns are often the focus of competing thoughts that can take us away from listening and challenge our ability to concentrate on others' messages. Two common barriers to concentration are self-centeredness and lack of motivation.[4] For example, when our self-consciousness is raised, we may be too busy thinking about how we look, how we're sitting, or what others think of us to be attentive to an incoming message. Additionally, we are often challenged when presented with messages that we do not find personally relevant. In general, we employ selective attention, which refers to our tendency to pay attention to the messages that benefit us in some way and filter others out. So the student who is checking his or her Twitter feed during class may suddenly switch his or

2. (Hargie, 2011)

3.

4. (Brownell, Wolvin & Coakley, 1993)

her attention back to the previously ignored professor when the following words are spoken: "This will be important for the exam."

Another common barrier to effective listening that stems from the speech and thought rate divide is response preparation. Response preparation refers to our tendency to rehearse what we are going to say next while a speaker is still talking. Rehearsal of what we will say once a speaker's turn is over is an important part of the listening process that takes place between the recalling and evaluation and/or the evaluation and responding stage. Rehearsal becomes problematic when response preparation begins as someone is receiving a message and hasn't had time to engage in interpretation or recall. In this sense, we are listening with the goal of responding instead of with the goal of understanding, which can lead us to miss important information that could influence our response.

MORE BARRIERS

Another barrier to effective listening is a general lack of listening preparation. Unfortunately, most people have never received any formal training or instruction related to listening. Although some people think listening skills just develop over time, competent listening is difficult, and enhancing listening skills takes concerted effort. Even when listening education is available, people do not embrace it as readily as they do opportunities to enhance their speaking skills. Listening is often viewed as an annoyance or a chore, or just ignored or minimized as part of the communication process. In addition, our individualistic society values speaking more than listening, as it's the speakers who are sometimes literally in the spotlight. Although listening competence is a crucial part of social interaction and many of us value others we perceive to be "good listeners," listening just doesn't get the same kind of praise, attention, instruction, or credibility as speaking. Teachers, parents, and relational partners explicitly convey the importance of listening through statements like "You better listen to me," "Listen closely," and "Listen up," but these demands are rarely paired with concrete instruction. So unless you plan on taking more communication courses in the future (and I hope you do), this chapter may be the only instruction you receive on the basics of the listening process, some barriers to effective listening, and how we can increase our listening competence.

Bad messages and/or speakers also present a barrier to effective listening. Sometimes our trouble listening originates in the sender. In terms of message construction, poorly structured messages or messages that are too vague, too jargon filled, or too simple can present listening difficulties. In terms of speakers' delivery, verbal fillers, monotone voices, distracting movements, or a disheveled appearance can inhibit our ability to cognitively process a message[5]. Listening also becomes difficult when a speaker tries to present too much information. Information overload is a common barrier to effective listening that good speakers can help mitigate by building redundancy into their speeches and providing concrete examples of new information to help audience members interpret and understand the key ideas.

PREJUDICE AS A BARRIER TO LISTENING

Oscar Wilde said, "Listening is a very dangerous thing. If one listens one may be convinced." Unfortunately, some of our default ways of processing information and perceiving others lead us to rigid ways of thinking. When we engage in prejudiced listening, we are usually trying to preserve our ways of thinking and avoid being convinced of something different. This type of prejudice is a barrier to effective listening, because when we prejudge a person based on his or her identity or ideas, we usually stop listening in an active and/or ethical way.

We exhibit prejudice in our listening in several ways, some of which are more obvious than others. For example, we may claim to be in a hurry and only selectively address the parts of a message that we agree with or that aren't controversial. We can also operate from a state of denial where we avoid a subject or person altogether so that our views are not challenged. Prejudices that are based on a person's identity, such as race, age, occupation, or appearance, may lead us to assume that we know what he or she will say, essentially closing down the listening process. Keeping an open mind and engaging in perception checking can help us identify prejudiced listening and hopefully shift into more competent listening practices.

INATTENTIONAL BLINDNESS AS A BARRIER TO LISTENING

Do you regularly spot editing errors in movies? Can you multitask effectively, texting while talking with your friends or watching television? Are you fully aware of your surroundings? If you answered yes to any of those questions, you're not alone. And, you're most likely wrong.

More than 50 years ago, experimental psychologists began documenting the many ways that our perception of the world is limited, not by our eyes and ears, but by our minds. We appear able to process only one stream of information at a time, effectively filtering other information from awareness. To a large extent, we perceive only that which receives the focus of our cognitive efforts: our attention.

Imagine the following task, known as dichotic listening (e.g., Cherry, 1953; Moray, 1959; Treisman, 1960): You put on a set of headphones that play two completely different speech streams, one to your left ear and one to your right ear. Your task is to repeat each syllable spoken into your left ear as quickly and accurately as possible, mimicking each sound as you hear it. When performing this attention-demanding task, you won't notice if the speaker in your right ear switches to a different language or is replaced by a different speaker with a similar voice. You won't notice if the content of their speech becomes nonsensical. In effect, you are deaf to the substance of the ignored speech. But, that is not because of the limits of your auditory senses. It is a form of cognitive deafness, due to the nature of focused, selective attention. Even if the speaker on your right headphone says your name, you will notice it only about one-third of the time[6] And, at least by some accounts, you only notice

5. (Hargie, 2011)

6. (Conway, Cowan, Bunting, 2001).

it that often because you still devote some of your limited attention to the ignored speech stream[7]. In this task, you will tend to notice only large physical changes (e.g., a switch from a male to a female speaker), but not substantive ones, except in rare cases.

This selective listing task highlights the power of attention to filter extraneous information from awareness while letting in only those elements of our world that we want to hear. Focused attention is crucial to our powers of observation, making it possible for us to zero in on what we want to see or hear while filtering out irrelevant distractions. But, it has consequences as well: We can miss what would otherwise be obvious and important signals.

The same pattern holds for vision. In a groundbreaking series of studies in the 1970s and early 1980s, Neisser and his colleagues devised a visual analogue of the dichotic listening task[8]. Their subjects viewed a video of two distinct, but partially transparent and overlapping, events. For example, one event might involve two people playing a hand-clapping game and the other might show people passing a ball. Because the two events were partially transparent and overlapping, both produced sensory signals on the retina regardless of which event received the participant's attention. When participants were asked to monitor one of the events by counting the number of times the actors performed an action (e.g., hand clapping or completed passes), they often failed to notice unexpected events in the ignored video stream (e.g., the hand-clapping players stopping their game and shaking hands). As for dichotic listening, the participants were unaware of events happening outside the focus of their attention, even when looking right at them. They could tell that other "stuff" was happening on the screen, but many were unaware of the meaning or substance of that stuff.

Have you ever been paying attention to something so closely you missed another event in the background? Or have you ever been so used to seeing something a certain way that when it changed, you didn't even notice it had?

To test the power of selective attention to induce failures of awareness, Neisser and colleagues [9] designed a variant of this task in which participants watched a video of two teams of players, one wearing white shirts and one wearing black shirts. Subjects were asked to press a key whenever the players in white successfully passed a ball, but to ignore the players in black. As for the other videos, the teams were filmed separately and then superimposed so that they literally occupied the same space (they were partially transparent). Partway through the video, a person wearing a raincoat and carrying an umbrella strolled through the scene. People were so intently focused on spotting passes that they often missed the "umbrella woman." (Pro tip: If you look closely at the video, you'll see that Ulric Neisser plays on both the black and white teams.)

These surprising findings were well known in the field, but for decades, researchers dismissed their implications because the displays had such an odd, ghostly appearance. Of course, we would notice if the displays were fully opaque and vivid rather than partly transparent and grainy. Surprisingly, no studies were built on Neisser's method for nearly 20 years. Inspired by these counterintuitive findings and after discussing them with Neisser himself, Christopher Chabris and Daniel Simons revisited them in the late 1990s [10]. They replicated Neisser's work, again finding that many people missed the umbrella woman when all of the actors in the video were partially transparent and occupying the same space. But, we added another wrinkle: a version of the video in which all of the actions of both

7. (Cherry, 1953)
8. (Neisser & Becklen, 1975)
9. (Neisser, 1979)
10. (Simons & Chabris, 1999)

teams of players were choreographed and filmed with a single camera. The players moved in and around each other and were fully visible. In the most dramatic version, we had a woman in a gorilla suit walk into the scene, stop to face the camera, thump her chest, and then walk off the other side after nine seconds on screen. Fully half the observers missed the gorilla when counting passes by the team in white.

This phenomenon is now known as inattentional blindness, the surprising failure to notice an unexpected object or event when attention is focused on something else [11]. The past 15 years has seen a surge of interest in such failures of awareness, and we now have a better handle on the factors that cause people to miss unexpected events as well as the range of situations in which inattentional blindness occurs. People are much more likely to notice unexpected objects that share features with the attended items in a display.[12] For example, if you count passes by the players wearing black, you are more likely to notice the gorilla than if you count passes by the players wearing white because the color of the gorilla more closely matches that of the black-shirted players[13]. However, even unique items can go unnoticed. In one task, people monitored black shapes and ignored white shapes that moved around a computer window.[14] Approximately 30 percent of them failed to detect the bright red cross traversing the display, even though it was the only colored item and was visible for five seconds. The more effort a cognitive task requires the more likely it becomes that you'll miss noticing something significant.

Inattentional blindness is not just a laboratory curiosity—it also occurs in the real world and under more natural conditions. In a dramatic illustration of cell phone–induced inattentional blindness, Ira Hymen observed that people talking on a cell phone as they walked across a college campus were less likely than other pedestrians to notice a unicycling clown who rode across their path.

Recently, the study of this sort of awareness failure has returned to its roots in studies of listening, with studies documenting inattentional deafness: When listening to a set of spatially localized conversations over headphones, people often fail to notice the voice of a person walking through the scene repeatedly stating "I am a gorilla"[15]. Under conditions of focused attention, we see and hear far less of the unattended information than we might expect[16].

What makes these findings interesting and important is that they run counter to our intuitions. Most people are confident they would notice the chest-thumping gorilla. In fact, nearly 90%believe they would spot the gorilla[17], and in a national survey, 78% agreed with the statement, "People generally notice when something unexpected enters their field of view, even when they're paying attention to something else"[18]. Similarly, people are convinced that they would spot errors in movies or changes to a conversation partner[19]. We think we see and remember far more of our surroundings than we actually do. Most of the time, we are happily unaware of what we have missed, but we are fully aware of those elements of a scene that we have noticed. Consequently, if we assume our experiences

11. (Mack & Rock, 1998)

12. (Most, Simons, Scholl, Jimenez, Clifford, & Chabris, 2001).

13. (Simons & Chabris, 1999)

14. (Most, Simons, Scholl, Jimenez, Clifford, & Chabris, 2001).

15. (Dalton & Fraenkel, 2012)

16. (Macdonald & Lavie, 2011; Wayand, Levin, & Varakin, 2005)

17. (Levin & Angelone, 2008)

18. (Simons & Chabris, 2010)

19. (Levin & Angelone, 2008)

are representative of the state of the world, we will conclude that we notice unexpected events. We don't easily think about what we're missing.

13.7 IMPROVING LISTENING COMPETENCE

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LISTENING COMPETENCE AT EACH STAGE OF THE LISTENING PROCESS

Many people admit that they could stand to improve their listening skills. This section will help us do that. In this section, we will learn strategies for developing and improving competence at each stage of the listening process. We will also define active listening and the behaviors that go along with it.

We can develop competence within each stage of the listening process, as the following list indicates:[1]

- To improve listening at the receiving stage,
  - prepare yourself to listen,
  - discern between intentional messages and noise,
  - concentrate on stimuli most relevant to your listening purpose(s) or goal(s),
  - be mindful of the selection and attention process as much as possible,
  - avoid interrupting someone while they are speaking in order to maintain your ability to receive stimuli and listen, and,
  - pay attention so you can follow the conversational flow.
    - For more on the important of paying attention and being present check out this HBR article, [If you aspire to be a great leader, be present]
- To improve listening at the interpreting stage,

1. (Ridge, 1993)

- identify main points and supporting points;
- use contextual clues from the person or environment to discern additional meaning;
- be aware of how a relational, cultural, or situational context can influence meaning;
- be aware of the different meanings of silence; and
- note differences in tone of voice and other paralinguistic cues that influence meaning.

- To improve listening at the recalling stage,
  - use multiple sensory channels to decode messages and make more complete memories;
  - repeat, rephrase, and reorganize information to fit your cognitive preferences; and
  - use mnemonic devices as a gimmick to help with recall.
- To improve listening at the evaluating stage,
  - separate facts, inferences, and judgments;
  - be familiar with and able to identify persuasive strategies and fallacies of reasoning;
  - assess the credibility of the speaker and the message; and
  - be aware of your own biases and how your perceptual filters can create barriers to effective listening.
- To improve listening at the responding stage,
  - reflect information to check understanding,
  - ask appropriate clarifying and follow-up questions,
  - give feedback that is relevant to the speaker's purpose/motivation for speaking,
  - adapt your response to the speaker and the context, and
  - do not let the preparation and rehearsal of your response diminish earlier stages of listening.

13.8 ACTIVE LISTENING

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ACTIVE LISTENING

Active listening refers to the process of pairing outwardly visible positive listening behaviors with positive cognitive listening practices. Active listening can help address many of the environmental, physical, cognitive, and personal barriers to effective listening that we discussed earlier. The behaviors associated with active listening can also enhance informational, critical, and empathetic listening.

ACTIVE LISTENING CAN HELP OVERCOME BARRIERS TO EFFECTIVE LISTENING

Being an active listener starts before you actually start receiving a message. Active listeners make strategic choices and take action in order to set up ideal listening conditions. Physical and environmental noises can often be managed by moving locations or by manipulating the lighting, temperature, or furniture. When possible, avoid important listening activities during times of distracting psychological or physiological noise. For example, we often know when we're going to be hungry, full, more awake, less awake, more anxious, or less anxious, and advance planning can alleviate the presence of these barriers. For college students, who often have some flexibility in their class schedules, knowing when you best listen can help you make strategic choices regarding what class to take when. And student options are increasing, as some colleges are offering classes in the overnight hours to accommodate working students and students who are just "night owls" (Toppo, 2011). Of course, we don't always have control over our schedule, in which case we will need to utilize other effective listening strategies that we will learn more about later in this chapter.

In terms of cognitive barriers to effective listening, we can prime ourselves to listen by analyzing a listening situation before it begins. For example, you could ask yourself the following questions:

1. “What are my goals for listening to this message?”
2. “How does this message relate to me / affect my life?”
3. “What listening type and style are most appropriate for this message?”

As we learned earlier, the difference between speech and thought processing rate means listeners' level of attention varies while receiving a message. Effective listeners must work to maintain focus as much as possible and refocus when attention shifts or fades (Wolvin & Coakley, 1993). One way to do this is to find the motivation to listen. If you can identify intrinsic and or extrinsic motivations for listening to a particular message, then you will be more likely to remember the information presented. Ask yourself how a message could impact your life, your career, your intellect, or your relationships. This can help overcome our tendency toward selective attention. As senders of messages, we can help listeners by making the relevance of what we're saying clear and offering well-organized messages that are tailored for our listeners.

ACTIVE LISTENING BEHAVIORS

From the suggestions discussed previously, you can see that we can prepare for active listening in advance and engage in certain cognitive strategies to help us listen better. We also engage in active listening behaviors as we receive and process messages.

Paying attention is a key sign of active listening. Speakers usually interpret a listener's eye contact and body language as a signal of attentiveness. While a lack of eye contact may indicate inattentiveness, it can also signal cognitive processing.

When we look away to process new information, we usually do it unconsciously. Be aware, however, that your conversational partner may interpret this as not listening. If you really do need to take a moment to think about something, you could indicate that to the other person by saying, “That's new information to me. Give me just a second to think through it.” We already learned the role that back-channel cues play in listening. An occasional head nod and “uh-huh” signal that you are paying attention. However, when we give these cues as a form of “autopilot” listening, others can usually tell that we are pseudo-listening, and whether they call us on it or not, that impression could lead to negative judgments.

A more direct way to indicate active listening is to reflect previous statements made by the speaker. Norms of politeness usually call on us to reflect a past statement or connect to the speaker's current thought before starting a conversational turn. Being able to summarize what someone said to ensure that the topic has been satisfactorily covered and understood or being able to segue in such a way that validates what the previous speaker said helps regulate conversational flow. Asking probing questions is another way to directly indicate listening and to keep a conversation going, since they encourage and invite a person to speak more. You can also ask questions that seek clarification and not just elaboration. Speakers should present complex information at a slower speaking rate than familiar information, but many will not. Remember that your nonverbal feedback can be useful for a speaker, as it signals that you are listening but also whether or not you understand. If a speaker fails to read your nonverbal feedback, you may need to follow up with verbal communication in the form of paraphrased messages and clarifying questions.

As active listeners, we want to be excited and engaged, but don't let excitement manifest itself in interruptions. Being an active listener means knowing when to maintain our role as listener and resist the urge to take a conversational turn. Research shows that people with higher social status are more likely to interrupt others, so keep this in mind and be prepared for it if you are speaking to a high-status person, or try to resist it if you are the high-status person in an interaction (Hargie, 2001).

Note-taking can also indicate active listening. Translating information through writing into our own cognitive structures and schemata allows us to better interpret and assimilate information. Of course, note-taking isn't always a viable option. It would be fairly awkward to take notes during a first date or a casual exchange between new coworkers. But in some situations where we wouldn't normally consider taking notes, a little awkwardness might be worth it for the sake of understanding and recalling the information. For example, many people don't think about taking notes when getting information from their doctor or banker. I actually invite students to take notes during informal meetings because I think they sometimes don't think about it or don't think it's appropriate. But many people would rather someone jot down notes instead of having to respond to follow-up questions on information that was already clearly conveyed. To help facilitate your note-taking, you might say something like "Do you mind if I jot down some notes? This seems important."

In summary, active listening is exhibited through verbal and nonverbal cues, including steady eye contact with the speaker; smiling; slightly raised eyebrows; upright posture; body position that is leaned in toward the speaker; nonverbal back-channel cues such as head nods; verbal back-channel cues such as "OK," "mmhum," or "oh"; and a lack of distracting mannerisms like doodling or fidgeting(Hargie, 2011).

ACTIVE LISTENING AND CONFLICT

Active listening is challenging in calm everyday setting as we have seen. And I'm sad to report, it's even harder in times of conflict. When your brain is under the stress of conflict, it is extremely challenging to actively listen to what someone else is saying, because in a conflict situation you likely disagree with everything that is coming out of their mouth. In conflict is where the barriers to listening we saw in a previous chapter happen the most.

Think back to the idea of inattentional blindness. How do you think that impacts you in a conflict? Have you ever thought back to a high conflict situation and realized that you *missed* a key piece of information that was shared? Likely because in the heat of the moment you were too focused on either getting your point across, making your case, or figuring out how to make this conflict end. Inattentional blindness in conflict means that we are likely to miss key pieces of information, verbal or nonverbal. The more effort a cognitive task requires the more likely it becomes that you'll miss noticing something significant. This in and of itself can lead to more conflict.

Or what about the difference between the speech and thought rate? You can process information at significantly higher rate than someone can share with you. In a conflict situation, you can process *every* previous conversation or conflict you have had with this person and still "hear" what they said. But you aren't really listening when that is happening.

So what can you do about these challenges in a conflict situation? First, recognize that we are all wired to be distracted AND that you will likely miss something. Second, maximize the attention you do have available by avoiding distractions. The ring of a new call or the ding of a new text are hard to resist, so make it impossible to succumb to the temptation by turning your phone off or putting it somewhere out of reach when you are driving. If you know that you will be tempted and you know that using your phone will increase inattentional blindness, you must be proactive. Third, don't be afraid to slow down and pause a conversation because you were *actively listening* to someone. You build stronger relationships by showing people that you are truly listening to them and will give the hard conversations they time they deserve.

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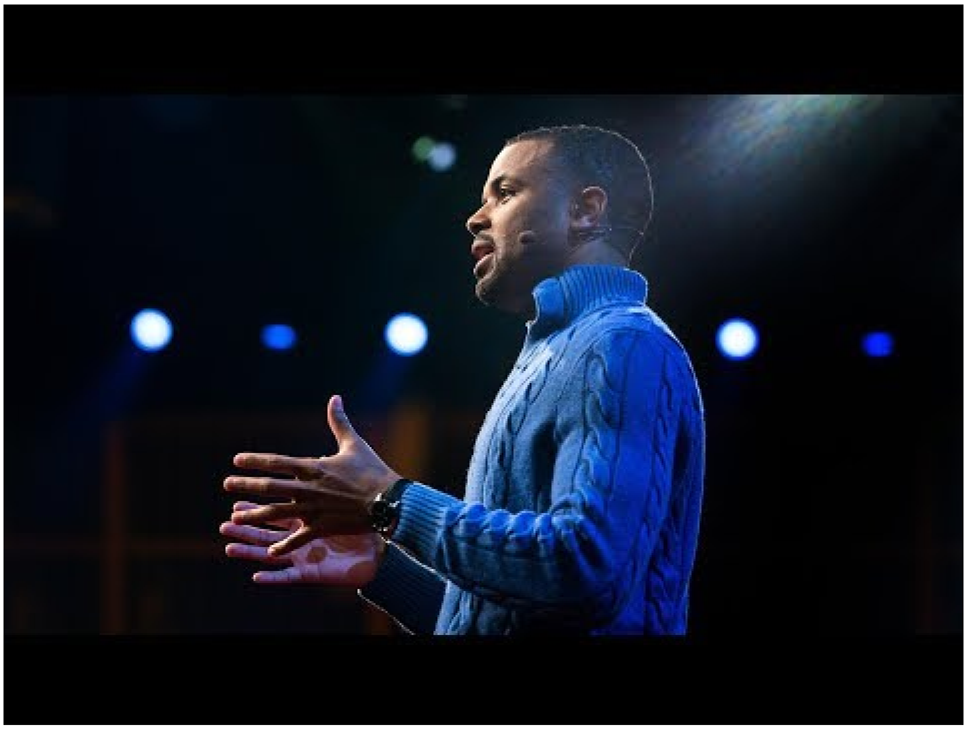

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13.9 I-STATEMENTS – OWNING YOUR VOICE

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I-STATEMENTS – OWNING YOUR STORY

One way to effectively manage conflict is to own your story and your voice by using **I-statements**. Statements that directly express your thoughts, needs, feelings, and experiences to the people around you. I-statements allow us to take responsibilities for our experiences and places the power of our lives in our hands. I-statements look like this:

- I feel…
- I think…
- I experienced it like this…
- I want…
- I need…

I-statements are contrasted with **You-statements.** Statements that imply the other person is responsible for something. You-statements typically blame on the other person. You statements look like this:

- You made me feel…
- You don't care about me.
- You never think about how that would impact us.
- You didn't…

I-Statements vs You-Statements	
I felt unappreciated.	You don't care about me.
I need some help.	You are a freeloader and never help.
I felt…	You made me feel….
It makes me sad to be left out.	You never invite me out with your friends.

Watch out for those *fake* I-Statements that so regularly sneak into our conversations. “I feel you…”, “I think you”, “I want you to…” are hidden You-Statements.

13.10 ASKING GREAT QUESTIONS

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> **“The ability to ask questions is the greatest resource in learning the truth.” Carl Jung**

QUESTIONS – THE KEY TO LEARNING

The key to asking really great questions is being a really great listener. If you are listening, actively, you will recognize what information you are missing, or what you need clarification on. Below is a look at some basic types of questions to understand and master.

There is a general distinction made between **Open Ended Question**, questions that likely require some thought and/or more than a yes/no answer, and **Close Ended Questions,** questions that only require a specific answer and/or a yes/no answer. This is an important distinction to understand and remember. In the context of managing conflict open ended questions are utilized for Information Gathering and close ended questions are used for Clarifying concepts or ideas you have heard. Here are examples of these types of questions.

CLARIFYING QUESTIONS (CLOSE ENDED QUESTION)

- Is this what you said…?
- Did I hear you say…?
- Did I understand you when you said…?
- Did I hear you correctly when you said…?

- Did I paraphrase what you said correctly?
- So this took place on….?
- So you would like to see…?

INFORMATION GATHERING QUESTIONS (OPEN ENDED QUESTIONS)

- If there was one small way that things could be better starting today, what would that be?
- How did you feel when…?
- How could you have handled it differently?
- When did it began?
- When did you first notice…?
- When did that happen?
- Where did it happen?
- What was that all about?
- What happened then?
- What would you like to do about it?
- I want to understand from your perspective, would you please tell me again?
- What do you think would make this better going forward?
- What criteria did you use to…?
- What's another way you might…?
- What resources were used for the project?
- Tell me more about… (not a question, but an open ended prompt)

A type of question to watch out for is **Leading Questions**, which provides a direction or answer for someone to agree or disagree with. An example would be, "So you are going to vote for____ for president, aren't you?" or "What they did is unbelievably, don't you agree?" These questions can easily be turned into information gathering questions, "Who are you going to vote for this year?" or "What do you this about their behavior?"

13.11 FRAMING AND REFRAMING

ASHLEYORME

> **"Our key to transforming anything lies in our ability to reframe it." Marianne Williamson**


FRAMING AND REFRAMING

Framing, in communication, is essentially the act of intentionally setting the stage for the conversation you want to have. In framing a conversation you express why you want to engage in this topic, what your intent is, and what you hope the outcome can be for resolving the conflict, as well as the impact/importance of your relationship. When you frame a conversation, you take out the need for the other person to assume what your intentions and motives are or why you are bringing this topic up right now.

There are many ways to frame a conversations, here are a few ideas for how to frame a conversation effectively.

ASK IF THIS IS A GOOD TIME TO TALK

"I have been wanting to connect with you to discuss___. Would now be a good time?" (If the answer is no, take a minute to schedule a good time)

CONSIDER SHARING YOUR "WHY", CONCERNS, AND INTENTIONS

"This is important to me because….."

"I'm only bringing this up because I want us and this project to be successful and I'm worried that we are missing something."

"My intention is…."

"My intention is to share my thoughts with you, but I don't have any expectations that you do anything with them."

"I care about our relationships and want to make sure we are addressing challenges as they come up." "I'm not sure how this will go."

"I'm pretty stressed about this because I'm not sure how this conversation is going to go."

"I have been thinking about this a lot and figured it was time to ask for help."

ASSERTIVE FRAMING – FRAMING A BOUNDARY

"I know this is important to you and I'm just too busy to go to that concert right now. "

"I can see this isn't a good time to talk, so I'd like to set up a time that works better."

"I'm sorry, I already have too much on my plate."

"I appreciate you thinking of me for this project. I'm currently working on X, which means unfortunately, I can't do both and have to say no to your request."

Framing sets the stage for the rest of the conversation to unfold. A little bit of framing goes a long way in helping conversations be more productive, and help manage some of the conflict that can happen when people have to make assumptions about "why" and conversation or conflict is happening.

For more ideas around framing, The Gottman institute has a really great infographic that shares their version of framing, Harsh Start Ups vs Soft Start Ups.

REFRAMING

Framing happens at the beginning of a conversation, **Reframing** happens when things get off track and you need to bring a conversation back on topic. Consider this picture.

In the center of the picture is a Frame, that is only covering part of the ocean and cliff. If we expanded that frame to surround the entire picture, that would be reframing. Reframing, in a conversation, helps us see more of what is going on, helps us focus on the larger picture or our end goals, and helps defuse tense situations. Reframing can be used for many things when managing conflict.

- Defusing inflammatory language
- Recasting negatives into neutral or positive statements
- Refocusing attention
- Acknowledging strong emotions in a productive manner
- Translating communication so that it is more likely to be heard and acknowledged by other parties
- Recontextualizing the dispute, providing a broader perspective

Reframing Examples	
Original Statement	Reframed Statement
"You misinterpret everything."	"We must be misunderstanding each other. Can you help me understand what you meant"
"I am fed up with your negative response to everything that is proposed."	"I agree. Let's focus on finding a solution and move away from negativity."
"Can we just keep talking about this one detail?"	"If you are okay with it, can we make sure we have the big picture figured out before focusing on details? Maybe the details will become more clear then."
"That seems really petty! Can you believe that keeps happening?"	"That sounds irritating. What do you need to move past this moment and look for a solution."

13.12 NONVERBAL COMMUNICATION

ASHLEYORME

> **“Nonverbal communication forms a social language that in many ways is richer and more fundamental than our words.”**
> **Leonard Mlodinow**

NON-VERBAL COMMUNICATION

How do you know when your friends, family, bosses, or instructors are pleased with your progress (or not)? You might know from the smiles on their faces; from the time and attention they give you; or perhaps in other nonverbal ways, like a raise, a bonus, or a good grade. Whether the interaction takes place face-to-face or at a distance you can still experience and interpret nonverbal responses.

Chances are you have had many experiences where words were misunderstood or where the meaning of words was unclear. When it comes to nonverbal communication, meaning is even harder to discern. We can sometimes tell what people are communicating through their nonverbal communication, but there is no foolproof “dictionary” of how to interpret nonverbal messages. **Nonverbal communication** is the process of conveying a message without the use of words. It can include gestures and facial expressions, tone of voice, timing, posture, and where you stand as you communicate. It can help or hinder the clear understanding of your message, but it doesn't reveal (and can even mask) what you are really thinking. Nonverbal communication is far from simple, and its complexity makes our study and our understanding a worthy but challenging goal.

Nonverbal communication involves the entire body, the space it occupies and dominates, the time it interacts, and not only what is not said, but how it is not said. Try to focus on just one element of nonverbal communication and it will soon get lost among all the other stimuli. Let's consider eye contact. What does it mean by itself without context, chin position, or eyebrows to flag interest or signal a threat? Nonverbal action flows almost seamlessly from one to the next, making it a challenge to interpret one element or even a series of elements.

Nonverbal communication is irreversible. In written communication, you can write a clarification, correction, or retraction. While it never makes the original statement go completely away, it does allow for correction. Unlike written communication, oral communication may allow "do-overs" on the spot: you can explain and restate, hoping to clarify your point. Oral communication, like written communication, allows for some correction, but it still doesn't erase the original message or its impact. Nonverbal communication takes it one step further. You can't separate one nonverbal action from the context of all the other acts of verbal and nonverbal communication, and *you can't take it back*. You need to be conscious of this aspect of your nonverbal behavior, in the case of nonverbal communication actions really do speak louder than words. This is true in the sense that people often pay more attention to your nonverbal expressions more than your words. As a result, nonverbal communication is a powerful way to contribute to (or detract from) your success in communicating your message to others.

Carlos Budding provides insights into non-verbal communication in his Ted Talk "Eye" Understand: The power of non-verbal communication.

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NONVERBAL COMMUNICATION IS FAST

Let's pretend you are at your computer at work. You see that an e-mail has arrived, but you are right in the middle of a complex task. The e-mail is from a coworker and you click on it. The subject line reads "let go." You could interpret this to mean a suggestion there is a joke about Disney's Frozen in the email or a challenge to release some stress but letting go, but in the context of the workplace you may assume it means getting fired. Your emotional response is immediate. If the author of the e-mail could see your face, they would know that your response was one of disbelief and frustration, even anger, all via your nonverbal communication.

Your nonverbal communication happens like this all the time without much conscious thought at all. You may think about how to share the news with your partner and try to display a smile and a sense of calm when you feel like anything but smiling. Nonverbal communication gives our thoughts and feelings away before we are even aware of what we are thinking or how we feel. People may see and hear more than you ever anticipated. Your nonverbal communication includes both intentional and unintentional messages, but since it all happens so fast, the unintentional ones can contradict what you know you are supposed to say or how you are supposed to react.

For example, suppose you are working as a salesclerk in a retail store, and a customer just communicated their frustration to you, about something you don't think is a big deal. Would the nonverbal aspects of your response be intentional or unintentional? Your job is to be pleasant and courteous at all times, yet your wrinkled eyebrows or wide eyes may have been unintentional. Your nonverbals clearly communicate your negative feelings at that moment. Restating your wish to be helpful and displaying nonverbal gestures may communicate "no big deal," but the stress of the moment is still "written" on your face.

Can we tell when people are intentionally or unintentionally communicating nonverbally? Ask ten people this question and compare their responses. You may be surprised. It is clearly a challenge to understand nonverbal communication in action. We often assign intentional motives to nonverbal communication when in fact their display is unintentional and often hard to interpret.

As you can see, nonverbal communication can be confusing. We need contextual clues to help us understand, or begin to understand, what a movement, gesture, or lack of display means. Then we have to figure it all out based on our prior knowledge (or lack thereof) of the person and hope to get it right. Talk about a challenge. Nonverbal communication is everywhere, and we all use it, but that doesn't make it simple or independent of when, where, why, or how we communicate.

NONVERBAL MESSAGES COMMUNICATE FEELINGS AND ATTITUDES

Steven Beebe, Susan Beebe, and Mark Redmond (2002) offer us three additional principals of interpersonal nonverbal communication that serve our discussion.

1. You often react faster than you think
2. Your nonverbal responses communicate your initial reaction before you can process it through language or formulate an appropriate response
3. If your appropriate, spoken response doesn't match your nonverbal reaction, you may give away your true feelings and attitudes

Albert Mehrabian asserts that we rarely communicate emotional messages through the spoken word.

According to Mehrabian, 93 percent of the time we communicate our emotions nonverbally, with at least 55 percent associated with facial gestures. Vocal cues, body position and movement, and normative space between speaker and receiver can also be clues to feelings and attitudes (Mehrabain, 1972).

Is your first emotional response always an accurate and true representation of your feelings and attitudes, or does your emotional response change across time? We are all changing all the time, and sometimes a moment of frustration or a flash of anger can signal to the receiver a feeling or emotion that existed for a moment but has since passed. Their response to your communication will be based on that perception, even though you might already be over the issue. According to William Seiler and Melissa Beall, most people tend to believe the nonverbal message over the verbal message. People will often answer that "actions speak louder than words" and place a disproportionate emphasis on the nonverbal response (Seiler & Beall, 2000). This is why it is important for us to be aware of our own nonverbal communication and ensure we are communicating what we mean. Some common ways we communicate our emotions through nonverbal communication that we may or may not recognize include:

- Reduction in eye contact while engaged in a conversation
- Awkward pauses in conversation
- Higher pitch in voice
- Deliberate pronunciation and articulation of words
- Increased delay in response time to a question
- Increased body movements like changes in posture
- Decreased smiling
- Decreased rate of speech

This is where the spoken word serves us well. You may need to articulate clearly that you were frustrated, but not anymore. The words spoken out loud can serve to clarify and invite additional discussion.

For more information on non-verbal communication check out the Ted Talk from Lynne Franklin, Reading Minds Though Body Language, and article by Abhimanyu Das, 7 ways to be a better communicator – tweak your body language e.g. [new tab]

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13.13 USING THESE TOOLS

ASHLEYORME

> **“Communication is a skill that you can learn. It’s like learning to ride a bicycle or typing. If you’re willing to work at it, you can rapidly improve the quality of every part of your life.”**
> **Brian Tracy**

USING THESE TOOLS FOR SELF-AWARENESS BUILDING

One of the greatest gifts we can give ourselves is reflecting upon our strengths and weaknesses when it comes to how our communication and conflict management skills and how they impact the relationships in our lives. Understanding our capability to actively listen, how we express ourselves and our ideas, how we frame our intent and purposes, and how we present ourselves non-verbally can provide insight into the success and failure of friendships or romantic relationships, as well as the depth of connection we have with our family or coworkers.

The frameworks and tools in this chapter allow for us to consider and understand:

- what type of listener you are
- what style of listening do you use most regularly
- what barriers to listening do you experience
- how you express yourself and your story (i-statements or you-statements)

- how effective you are at asking questions
- how you frame your conversations and your ability to reframe a conversation when necessary
- how you communicate nonverbally and it's impact on your relationships

Once we understand ourselves in these ways we can ask ourselves the hard questions, where am I successful in utilizing these tools and where can I improve? Taking an honest inventory of our communication and conflict management skills allows us to accurately identify what we should keep doing and what we should stop doing. Things to consider in this reflection process:

- ask for feedback about your skills from someone you trust
- think about successful relationships you have and consider what makes them so great – do more of that
- think about unsuccessful relationships you have and consider what makes them not so great – do less of that
- consider your role models, or people that have positively impacted you in your life, how do they communicate and manage conflict, this could provide interesting insight into areas to improve yourself

From these reflections, pick 1 or 2 small things that you want to work on to either continue doing, potentially with more frequency or that you want to improve. As the saying goes, you can't boil the ocean. You also can't change everything about your communication and conflict management styles at one time. Often 1 or 2 changes is plenty for the brain to work on. Commit to yourself when and where you will try to improve and set a time to check back in with yourself to reflect on how the change is going.

USING THESE TOOLS FOR OTHER AWARENESS BUILDING

Once we understand ourself, we can move into the utilization of these skills to understand others. You can consider:

- what type of listener are they
- what style of listening do you think they have
- what barriers to listening do you see or experience when talking to them
- how you they express themselves and their story (i-statements or you-statements)
- do they ask you questions and are they effective
- do they frame or reframe a conversation when necessary
- what they communicate nonverbally and it's impact on you

You can combine your question asking and your listening skills to really dig into understanding others and their skills. You can watch for nonverbal cues and work towards utilizing the empathetic listening style to understand the perspective of another person.

USING THESE TOOLS FOR RELATIONSHIP BUILDING

After you understand yourself and others in these frameworks, you can start analyzing where some of these ideas can cause conflict and move towards managing these differences in a productive manner. For example –

> You are a time-oriented listener and your best friend is a people-oriented listener. Your friend wants to focus on your feelings and needs and you are just looking to get to the point as quickly as possible. This is a very common difference.

The strange and interesting thing here is that in this dynamic, you could have a *primary conflict* (lets say you and your best friend are in a conflict about how to spend the up coming weekend) and now you also have a *secondary conflict*, that comes from the difference in the way you want to address the primary conflict. Often times the primary conflict and secondary conflict become inseparable. Listening for these kinds of differences helps us disentangle the primary conflict from the secondary conflicts. Once we recognize them we can use our framing and reframing skills to manage these differences directly. For example:

> Reframe – "I think we are approaching this conversation differently. (*I-Statement*) It sounds like focusing on the task and solving this problem quickly is important to you (*Reflection*) and for me I want to make sure we address our feelings and the impact of this situation on our friendship (*Frame*). Are you okay with addressing both side of this situation knowing we both want a positive solution in this situation?" (*Clarifying question)*

We build relationships by putting these tools together. Listening is the foundation, expressing ourselves through I-Statements, asking questions to understand and clarify, and framing and reframing the conflict and why it is important allows us to really connect with the people around us, through empathy and understanding, and build relationships with mutual respect and purpose.

13.14 ETHICAL BEHAVIOUR IN BUSINESS

Learning Objectives

After reviewing this information, you will be able to

- describe the role of ethics in a business environment
- explain what it means to be a professional of integrity
- distinguish between ethical and legal responsibilities
- describe three approaches for examining the ethical nature of a decision

INTRODUCTION

Whenever you think about the behaviour you expect of yourself in your personal life and as a professional, you are engaging in a philosophical dialogue with yourself to establish the standards of behaviour you choose to uphold, that is, your **ethics**. You may decide you should always tell the truth to family, friends, customers, clients, and shareholders, and if that is not possible, you should have very good reasons why you cannot.

Clients, customers, suppliers, investors, retailers, employees, the media, the government, members of the surrounding community, competitors, and even the environment are stakeholders in a business; that is, they are individuals and entities affected by the business's decisions. Stakeholders typically value a leadership team that chooses the ethical way to accomplish the company's legitimate for-profit goals.

Being successful at work may consist of much more than simply earning money and promotions. It may also mean treating employees, customers, and clients with honesty and respect. Thus, business ethics guides the conduct by which companies and their agents abide by the law and respect the rights of their stakeholders, particularly their customers, clients, employees, and the surrounding community and environment. The video below provides information on how to be ethical in five very distinct areas.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=281#h5p-149

ETHICAL VS. LEGAL

Many people confuse legal and ethical compliance. They are, however, totally different and call for different standards of behaviour. The concepts are not interchangeable in any sense of the word. The law is needed to establish and maintain a functioning society. Without it, our society would be in chaos. Compliance with these legal standards is strictly mandatory: if we violate these standards, we are subject to punishment as established by the law. Therefore, compliance in terms of business ethics generally refers to the extent to which a company conducts its business operations in accordance with applicable regulations, statutes, and laws. Yet this represents only a baseline minimum. Ethical observance builds on this baseline and reveals the principles of an individual business leader or a specific organization. Ethical acts are generally considered voluntary and personal—often based on our perception of or stand on right and wrong.

Some professions, such as medicine and the law, have traditional codes of ethics. The Hippocratic Oath, for example, is embraced by most professionals in health care. Business is different in not having a mutually shared standard of ethics. This is changing, however, as evidenced by the array of codes of conduct and mission statements many companies have adopted over the past century. These have many points in common, and their shared content may eventually produce a code universally claimed by business practitioners of how to treat with honesty and integrity customers, clients, employees, and others affiliated with a business.

Behaving ethically requires that we meet the mandatory standards of the law, but that is not enough. For example, an action may be legal that we personally consider unacceptable. Companies today need to be focused not only on complying with the letter of the law but also on going above and beyond that basic mandatory requirement to consider their stakeholders and do what is right.

Ethisphere provides an annual report on the world's most ethical business based on several categories: ethics and compliance program, organizational culture, corporate citizenship and responsibility, governance, and leadership and reputation. Take a look at the Canadian companies that made the 2020 list.

AN INTERACTIVE H5P ELEMENT HAS BEEN EXCLUDED FROM THIS VERSION OF THE TEXT. YOU CAN VIEW IT ONLINE HERE:
HTTPS://PRESSBOOKS.NSCC.CA/NSCCCOMMTRADES/?P=281#H5P-150

THE BENEFITS OF BEING ETHICAL

The notion that maximizing profit is the sole objective of any business does not reflect the modern business environment. Today, leadership is grounded in doing right by all stakeholders directly affected by a firm's operations. That is, business leaders do right when they think about what is best for *all* who have a stake in their companies, and not just think about maximizing profit. Not only that, research shows that companies benefit financially when they take a holistic approach to their operations, especially over the long run.

Figure 13.14.1: Statistics on the impact of the 2020 most ethical companies. (Ethisphere, 2020)

Although it is certainly permissible and even desirable for a company to pursue profitability as a goal, managers must also have an understanding of the context within which their business operates and of how the wealth created can add positive value to the world. Even as a company pursues the maximizing of profit, it must also acknowledge that it owes a reciprocal obligation to do what is best for as many stakeholders as possible.

WHAT EMPLOYERS OWE EMPLOYEES

A contemporary corporation always owes an ethical, and in some cases legal duty to employees to be a responsible employer. In a business context, the definition of this responsibility includes providing a safe workplace, compensating workers fairly, and treating them with a sense of dignity and equality while respecting at least a minimum of their privacy. A discussion of three such ethical responsibilities follows.

MODELLING ETHICAL BEHAVIOUR

If a corporation expects its employees to act ethically, that behaviour must start at the top, where managers hold themselves to a high standard of conduct and can rightly say, “Follow my lead, do as I do.” At a minimum, leaders model ethical behaviour by not violating the law or company policy. One who says, “Get this deal done, I don’t care what it takes,” may very well be sending a message that unethical tactics and violating the spirit, if not the letter, of the law, are acceptable. A manager who abuses company property by taking home office supplies or using the company’s computers for personal business but then disciplines any employee who does the same is not modeling ethical behaviour. Likewise, a manager who consistently leaves early but expects all other employees to stay until the last minute is not demonstrating fairness.

TRANSPARENCY

This duty begins during the hiring process when the company communicates to potential employees exactly what is expected of them. Once hired, employees should receive training on the company rules and expectations. Management should explain how an employee’s work contributes to the achievement of company-wide goals. In other words, a company owes it to its employees to keep them in the loop about significant matters that affect them and their job, whether good or bad, formal or informal. A more complete understanding of all relevant information usually results in a better working relationship.

Transparency can be especially important to workers in circumstances that involve major changes, such as layoffs, reductions in the workforce, plant closings, and other consequential events. These kinds of events typically have a psychological and financial impact on the entire workforce. An ethical company will give workers advance notice, a severance package, and assistance with the employment search, without being forced to do so by law. Proactive rather than reactive behaviour is the ethical and just thing to do.

SAFETY AND SECURITY

Employers also have an ethical and legal duty to provide a workplace free of harassment of all types. This includes harassment based on sex, race, religion, national origin, and any other protected status, including disability. Employees should not be expected to work in an atmosphere where they feel harassed, discriminated against, or disadvantaged.

Two relatively recent examples of workplace environments that descended into the worst excesses of sexist and other inappropriate behaviour occurred at American Apparel and Uber. In both cases, principal leaders engaged in ruthless, no-holds-barred management practices that benefitted only those subordinates who most resembled the leaders themselves. Such environments may thrive for a while, but the long-term consequences can include criminal violations that produce hefty fines and imprisonment, bankruptcy, and radical upheaval in corporate management. At American Apparel and at Uber, these events resulted in the dismissal of each company's CEO, Dov Charney (who also was the founder of the company) and Travis Kalanick (who was one of the corporation's founders), respectively.

In 2017 and 2018, a renewed focus on sexual harassment in the workplace and other inappropriate sexual behaviours brought a stream of accusations against high-profile people in politics, entertainment, sports, and business. Entertainment industry mogul Harvey Weinstein; Pixar's John Lasseter; on-air personalities Matt Lauer and Charlie Rose; politicians such as Roy Moore, John Conyers, and Al Franken; and Uber's Kalanick, to name just a few.

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WHAT EMPLOYEES OWE EMPLOYERS

Employees must also do their part in maintaining ethics in the work environment. A few of the obligations that employees owe their employer are discussed below.

LOYALTY

Our understanding of commitment and loyalty between employer and employee is changing. An ethical employee owes the company a good day's work and his or her best effort, whether the work is stimulating or dull. A duty of loyalty and the best effort are the primary obligations of employees. However, a manager who expects a twentieth-century concept of loyalty in the twenty-first century may be surprised.

One indicator that our understanding of the term is changing is that millennials are three times more likely than older generations to change jobs. According to a *Forbes* Human Resources Council survey, about nine in ten millennials (91 percent) say they do not expect to stay with their current job longer than three years, compared with older workers who often anticipated spending ten years or even an entire career with one employer.

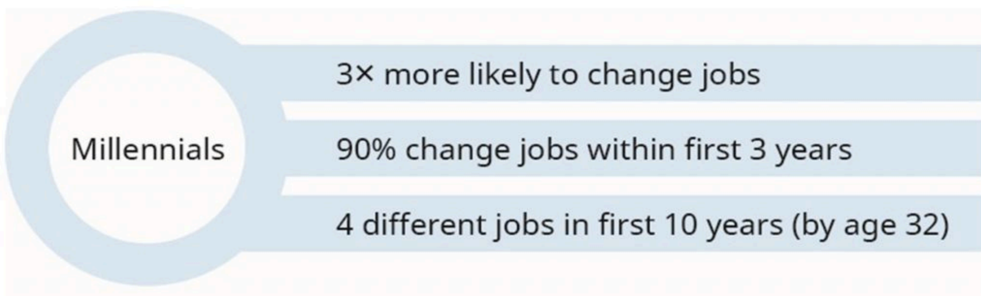

Figure 13.14.2: Results of the Forbes survey confirm the changing expectations between millennials and previous generations. (Forbes, 2017)

Loyalty to an employer requires that an employee refrains from acting in a manner contrary to the employer's interest. This duty creates some basic rules employees must follow on the job and provides employers with enforceable rights against employees who violate them. In general terms, the duty of loyalty means an employee is obligated to render "loyal and faithful" service to the employer, to act with "good faith," and not to compete with but rather to advance the employer's interests. The employee must not act in a way that benefits him- or herself (or any other third party), especially when doing so would create a conflict of interest with the employer.

CONFIDENTIALITY

Employers can also expect their employees to owe them a duty of confidentiality. In the competitive world of business, many employees encounter information in their day-to-day work that their employers reasonably expect to be kept confidential. Proprietary (private) information, the details of patents and copyrights, employee records and salary histories, and customer-related data are valued company assets that must remain in-house, not in the hands of competitors, trade publications, or the news media. Employers

RESPECTING THE BRAND

Every company puts time, effort, and money into developing a brand, that is, a product or service marketed by a particular company under a particular name. As Apple, Coca-Cola, Amazon, BMW, McDonald's, and creators of other coveted brands know, branding—creating, differentiating, and maintaining a brand's image or reputation—is an important way to build company value, sell products and services, and expand corporate goodwill. In the sense discussed here, the term "brand" encompasses an image, reputation, logo, tagline, or specific color scheme that is trademarked, meaning the company owns it and must give permission to others who would legally use it (such as Tiffany's unique shade of blue).

Companies want and expect employees to help in their branding endeavors. Disloyal or disgruntled employees can damage a company's brand, especially on social media. Consider these examples:

- A photo posted on Taco Bell's Facebook page showed an employee licking a row of tacos.
- A Domino's Pizza employee can be seen in a YouTube video spitting on food, putting cheese into his nose and then putting that cheese into a sandwich, and rubbing a sponge used for dishwashing on his groin area.
- A Burger King employee in Japan posted a photo of himself on Twitter lying on hamburger buns while on duty.

All three companies experienced financial and goodwill losses after the incidents and struggled to restore public trust in their products. The immediate and long-term costs of such incidents are the reason companies invest in developing brand loyalty among their employees.

RESPECTING CUSTOMERS

As the public's first point of contact with a company, employees are obliged to assist the firm in forming a positive relationship with customers. How well or poorly they do so contributes a great deal to customers' impression of the company. And customers' perceptions affect not only the company but all the employees who depend on its success for their livelihood. Thus, the ethical obligations of an employee also extend to interactions with customers, whom they should treat with respect. Employers can encourage positive behaviour toward customers by empowering employees to use their best judgment when working with them.

It may take only one bad customer interaction with a less-than-engaged or committed employee to sour brand loyalty, no matter how hard a company has worked to build it. In the same way, just one good experience can build up goodwill.

FOLLOWING CODES OF CONDUCT

Companies have a right to insist that their employees, including managers, engage in ethical decision-making. To help achieve this goal, most businesses provide a written code of ethics or code of conduct for all employees to follow. These cover a wide variety of topics, from workplace romance and sexual harassment to hiring and termination policies, client and customer entertainment, bribery and gifts, personal trading of company shares in any way that hints of acting on insider knowledge of the company's fortunes, outside employment, and dozens of others. A typical code of conduct, regardless of the company or the industry, will also contain a variety of standard clauses, often blending legal compliance and ethical considerations. Table 7.1 provides examples of some areas that are typically covered in a company's code of conduct or code of ethics.

Table 13.14.1

Sample Code of Conduct

Compliance with all laws	Employees must comply with all laws, including bribery, fraud, securities, environmental, safety, and employment laws.
Corruption and fraud	Employees must not accept certain types of gifts and hospitality from clients, vendors, or partners. Bribery is prohibited in all circumstances.
Conflict of interest	Employees must disclose and/or avoid any personal, financial, or other interests that might influence their ability to perform their job duties.
Company property	Employees must treat the company's property with respect and care, not misuse it, and protect company facilities and other material property.
Cybersecurity and digital devices policy	Employees must not use company computer equipment to transfer illegal, offensive, or pirated material, or to visit potentially dangerous websites that might compromise the safety of the company network or servers; employees must respect their duty of confidentiality in all Internet interactions.
Social media policy	Employees may [or may not] access personal social media accounts at work but are expected to act responsibly, follow company policies, and maintain productivity.
Sexual harassment	Employees must not engage in unwelcome or unwanted sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature. Behaviours such as conditioning promotions, awards, training, or other job benefits upon acceptance of unwelcome actions of a sexual nature are always wrong.
Workplace respect	Employees must show respect for their colleagues at every level. Neither inappropriate nor illegal behaviour will be tolerated.

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Exercises

1. Suppose you work in retail sales for an international clothing company. A perk of the job is an employee discount of 25 percent on all merchandise you purchase for personal use. Your cousin, who is always looking for a bargain, approaches you in the store one day and implores you to give him your employee discount on a $100 purchase of clothes for himself.

    - How would you handle this situation and why?
    - Would it matter if the relative were someone closer to you, perhaps a brother or sister?
    - If so, why?

2. Imagine that upon graduation you have the good fortune to be offered two job opportunities. The first is with a corporation known to cultivate a hard-nosed, no-nonsense business culture in which keeping long hours and working intensely are highly valued. At the end of each year, the company

donates to numerous social and environmental causes. The second job opportunity is with a nonprofit recognized for a very different culture based on its compassionate approach to employee work-life balance. It also offers the chance to pursue your own professional interests or volunteerism during a portion of every workday. The first job offer pays 20 percent more per year.

- Which of these opportunities would you pursue and why?
- How important an attribute is salary, and at what point would a higher salary override for you the nonmonetary benefits of the lower-paid position?

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13.15 BUSINESS ETIQUETTE

Learning Objectives

After reviewing this information, you will be able to

- identify the importance of business etiquette

INTRODUCTION

Good manners and a professional attitude is an important intangible skill in the work environment. Employers want to hire and your peers will want to work with friendly, pleasant, and polite people. These intangible skills are called **Business Etiquette.** Your personal behaviour is important in establishing and maintaining harmony and contributing to a positive and energetic work environment. Our earlier examination of specific writing skills (e.g., using courteous, polite, and passive language) touched on this concept in written language. Here, we will examine specific applications of etiquette associated with how you present yourself in social situations, what type of telephone manners you have, your professional appearance and other areas of business etiquette.

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BUSINESS ETIQUETTE IN SOCIAL SETTINGS

From business lunches to conferences, you may need to represent your company in a variety of social settings. If you are at such an event, remember your manners will be assessed. Though it may not be obvious, people will observe whether you use your utensils correctly, chew with your mouth closed, use your cell phone when others are speaking, or dress appropriately. Why does all this matter?

You may think all of this has nothing to do with the quality of work; however, your business etiquette shows the extent to which you developed appropriate habits and are self-aware. Someone who chews with his/her mouth open, for instance, either lacks self-awareness or does not care what people think. Either way, that lack of self-awareness can lead to behaviors that will ruin the reputation of the company you represent.

Here are some tips on proper etiquette in social situations.[1]

Figure 13.15.1: Business is often conducted over meals. ([etiquettescholar.com,](etiquettescholar.com) 2019)

1. Get to know the culture of your audience. For example, in Canada a firm handshake is expected, while in Japan a bow of the head is expected
2. Include a brief description of your role in the company when introducing yourself to others
3. Know basic dining etiquette: don't order alcohol, order food that is easy to eat, leave business documents under your chair or in your briefcase until the entree plates have been removed
4. Don't use your cell phone until the meeting has concluded
5. Stay away from controversial topics, like politics, religion and personal matters
6. Don't speak poorly of your employer or job
7. Avoid profanity and be careful with humour

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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.

1. (Adapted from Business Communication Essentials, 2016).

- **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 are not given a specific uniform is what everyone else wears. Observe closely the style of your co-workers and build a similar wardrobe. If the fashion is slacks with a belt that matches the color 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. You might be against conformity, but consider this: according to a recent report a majority of managers report that an employee's attire affects his/her chances of receiving a promotion (SHRM.org 2020).

Figure 45.2: A recent report reveals what type of dress code employers prefer. (SHRM.org, 2020)

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TELEPHONE ETIQUETTE

The telephone is an essential communication medium that you will use frequently throughout your career. Business conversations over the phone are often direct and time-sensitive. Just like a letter, memo, or email, you don't want to make a phone call unless there is a reason. Thus, knowing some general rules around making business calls will ensure you are always prepared for all your telephone conversations.

- Give each phone call your full attention. Try not to have side conversations or answer other calls during your conversation.
- Plan what you will say. People are busy so use your time and their time efficiently.
- Leave clear messages. If someone is not available, leave a message with your contact information and the reason for the call.
- Have telephone manners. Don't do things like chewing gum while speaking with someone.
- Use a professional tone. Remember, the receiver can not see your body language. Therefore, non-verbal cues, such as tone of voice, become even more important in effectively communicating a message.
- Excuse yourself when you step away from the phone. If you need to leave your desk, inform the receiver.
- Apply active listening skills. Pay close attention to what the receiver is saying.

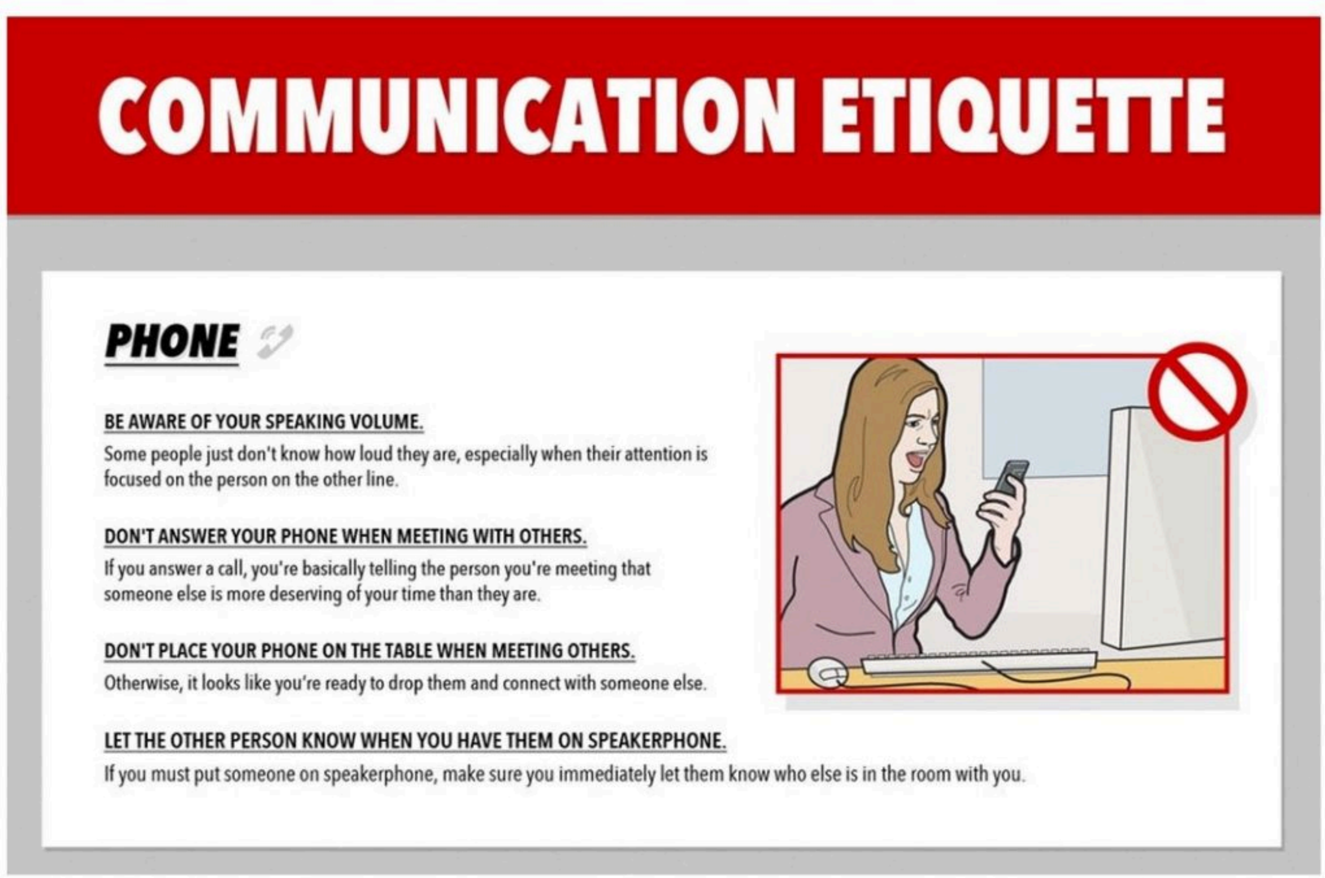

Figure 13.15.3: Whether a cell phone or landline, telephone conversations are an integral part of business. (Businessinsider.com, 2015)

BUSINESS ETIQUETTE IN THE DIGITAL AGE

People sometimes forget that good digital communication etiquette is as important as non-digital communication etiquette and can have as many potential pitfalls. Just as you represent your organization in face-to-face interactions, you do the same through your digital interaction with your company's stakeholders. Thus, learning the basics of professional etiquette in the digital world will be beneficial to your career. Figure 13.15.4 provides some professional etiquette tips for communicating online and via text message.

	Nettiqeutte		Text Etiquette
1	Don't get involved with attacking people about personal matters.	1	If the message would not be appropriate to communicate in a short phone call, it's not appropriate to communicate in a text.
2	Address one topic at a time. Start a new thread if you want to Introduce new topics.	2	Don't send or answer a text when you are in a face-to-face meeting or conversation.
3	Always check for correct use of grammar, punctuation and sentence structure.	3	Always provide your information when texting a contact for the first time.
4	Don't forget that you are representing your company, so keep opinions on controversial topics to yourself.	4	Ensure the message matches the medium. Don't use text messages for sad, personal, or sensitive news.
5	Don't reveal private information. Remember privacy does not exist in the online world.	5	Be patient. Wait for the receiver to respond.
6	Be careful to use your personal social media accounts to post public messages that could negatively impact your professional life.	6	Avoid sending personal, private, or embarrassing messages. Messages can go to or be seen by an unintended audience.

Figure 13.15.5: Knowing how to respectfully communicate on the web and via text message will add to your professional reputation. (Adopted from Business Communication Essential, 2016; Business Communication: Process and Product, 2019).

VIRTUAL MEETINGS

Many things about how business is conducted have changed. One of the areas most impacted is the rise and prevalence of virtual meeting. Virtual meetings are here to stay. Learning how to organize and participate in them will prove beneficial. The video below presents some virtual meeting etiquette best practices you should know.

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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.

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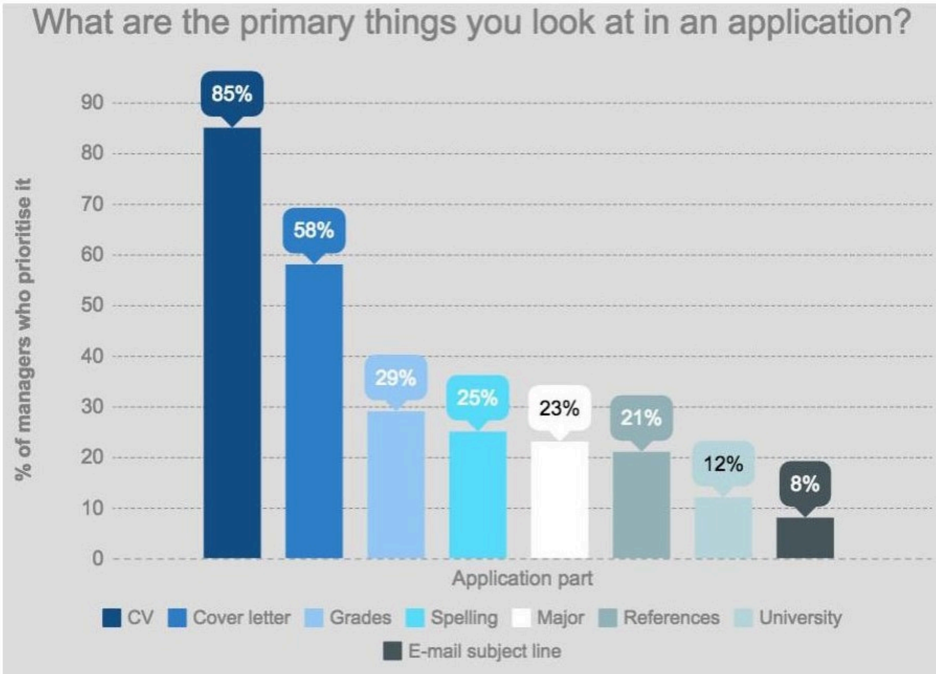
CHAPTER 14: EMPLOYMENT COMMUNICATIONS

INTRODUCTION

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's 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 below. 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 and getting your dream job.



Note: Employers indicate the information they consider most important in a job application package. (Hadicke, 2016)[1]

1. Hadicke, G. (2016). What employers want in your application. Graduateland. Retrieved from https://graduateland.com/article/what-employers-want-application

14.1 THE JOB SEARCH PROCESS

JORDAN SMITH

Learning Objectives

After reviewing this information, you will be able to

- identify and assess individual skills, strengths, and experiences to identify career and professional development goals
- understand effective job search strategies for today's job market

INTRODUCTION

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 skillset quite different from that which your core program courses teach you, yet you cannot get a job without this skill set. 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.

The following video provides an overview of what you will need to do to find your dream job.

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JOB SEARCH STRATEGIES

Finding a job in this very competitive job market may require the use of traditional and non-traditional strategies. Some of these strategies are examined here.

NETWORKING

A recent study showed that approximately 61% of job seekers either used their personal network and/or online social network to land their dream job[1]. What exactly is a personal network and why is it so effective? A network is a group of people with whom you have a personal relationship based on similar interests. As you build this network and cultivate the relationships, you develop a connection and most importantly trust with your the people in your network. These relationships come in very handy because the majority of the job market is hidden, that is, jobs that are not advertised through conventional avenues. Most jobs are often found through referrals and word of mouth; thus, having a network of people that can give you inside information about available jobs in your field is invaluable. In addition to the inside information, people in your network also serve as personal references and a bridge between your potential employer and you. Some tips to help you develop a personal network include:

- Develop a list of people to speak with about your job search
- Contact the people on your list
- Call and possibly arrange a meeting with any referrals provided by your contact list
- Join an online networking group
- Conduct research on additional networking tips and trends

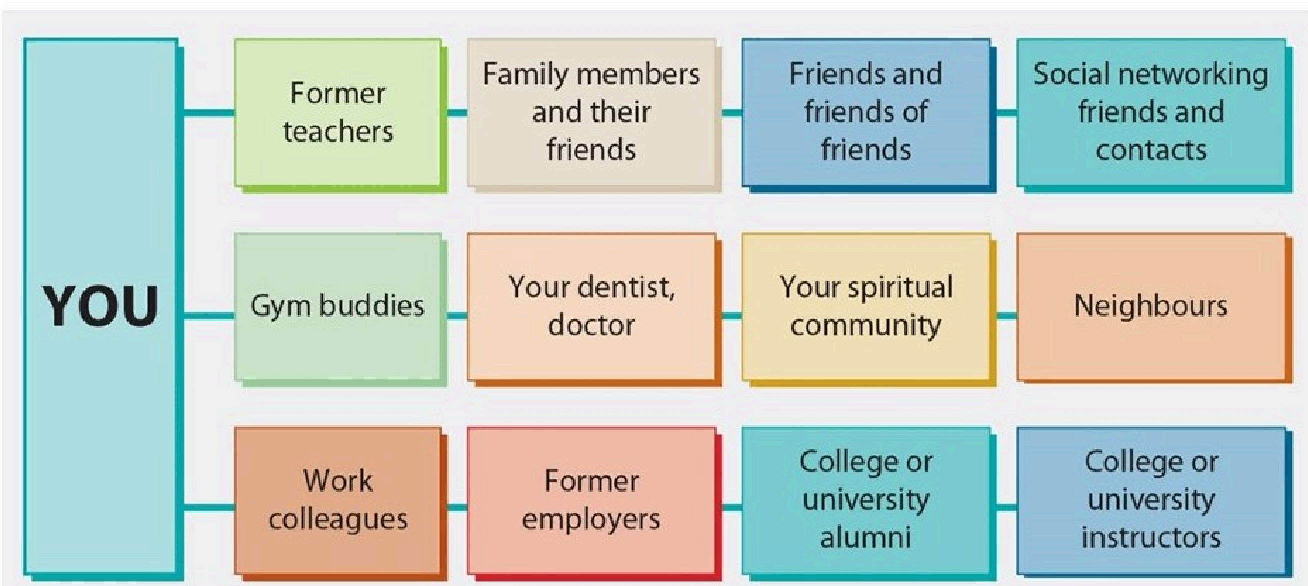

Figure 14.1.1: A matrix template to help develop a personal network. ([Business Communication](#), 2019)

ONLINE JOB SITES

According to a recent Jobvite survey, job boards continue to be the number one medium to access job opportunities[2]. Major job search engines like Monster and Indeed are good places to start your job

1. (*Business Communications*, 2019)
2. Morgan, H. (2019). A candidate's job market means stronger competition for job seekers. The savvy intern. Retrieved from https://www.youtern.com/thesavvyintern/index.php/2019/05/20/stronger-competition-job-seekers/

search process. However, both job seekers and employers have their objections to these sites. To job seekers, applying for a job through a job board 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 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 every applicant.

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:

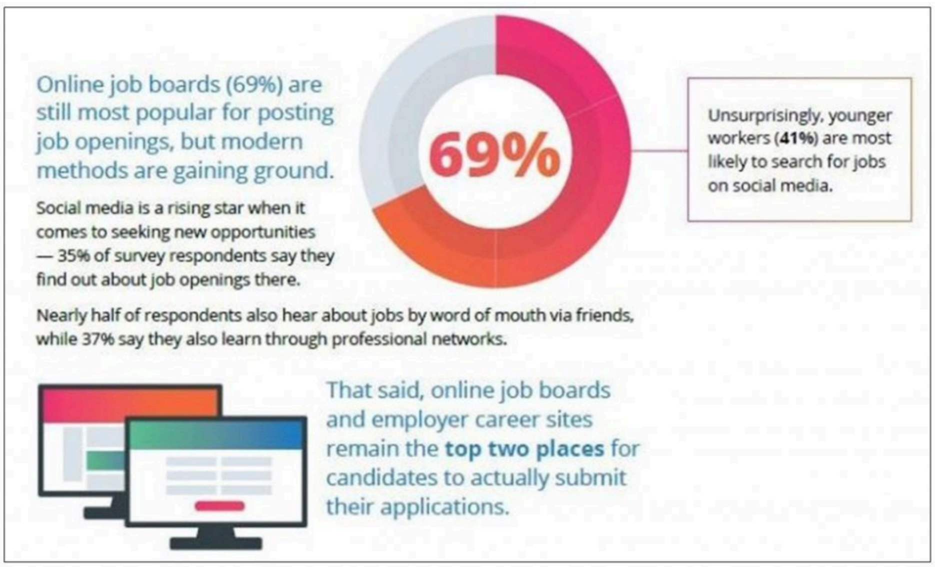

Figure 14.1.2: A recent survey confirms that job boards continue to be the number one job search tool. (Morgan, 2019)

- Job Bank
- Monster
- Indeed
- Workopolis
- CareerBuilder
- Eluta
- Jobboom

- Glassdoor
- SimplyHired
- WOWjobs
- Charity Village

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INDUSTRY CONFERENCES AND JOB FAIRS

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. You should also attend **career fairs** and sign up for interviews with visiting recruiters. Because colleges are a greenhouse for the emerging labour pool, they have tight connections with industry partners . When company recruiters come to your college, be there to ask them about their employment opportunities. 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.

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PERSONAL BRANDING

What is a personal brand and how do you develop one? The following TEDx talk provides an excellent explanation of the topic.

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Begin developing your personal brand by asking yourself the following questions:

- what about yourself do you want to emphasize in the job search process?
- What qualities distinguish you from everyone else?

- What unique skills can you offer your employer?
- What makes you a sought after employee?
- How will you make your future workplace better?

Use this information to promote yourself in online and offline forums. Online, create a Facebook page and a LinkedIn profile. Offline, create business cards and write a elevator pitch to introduce yourself at industry conferences and job fairs. No one will do better job at promoting you, than you will.

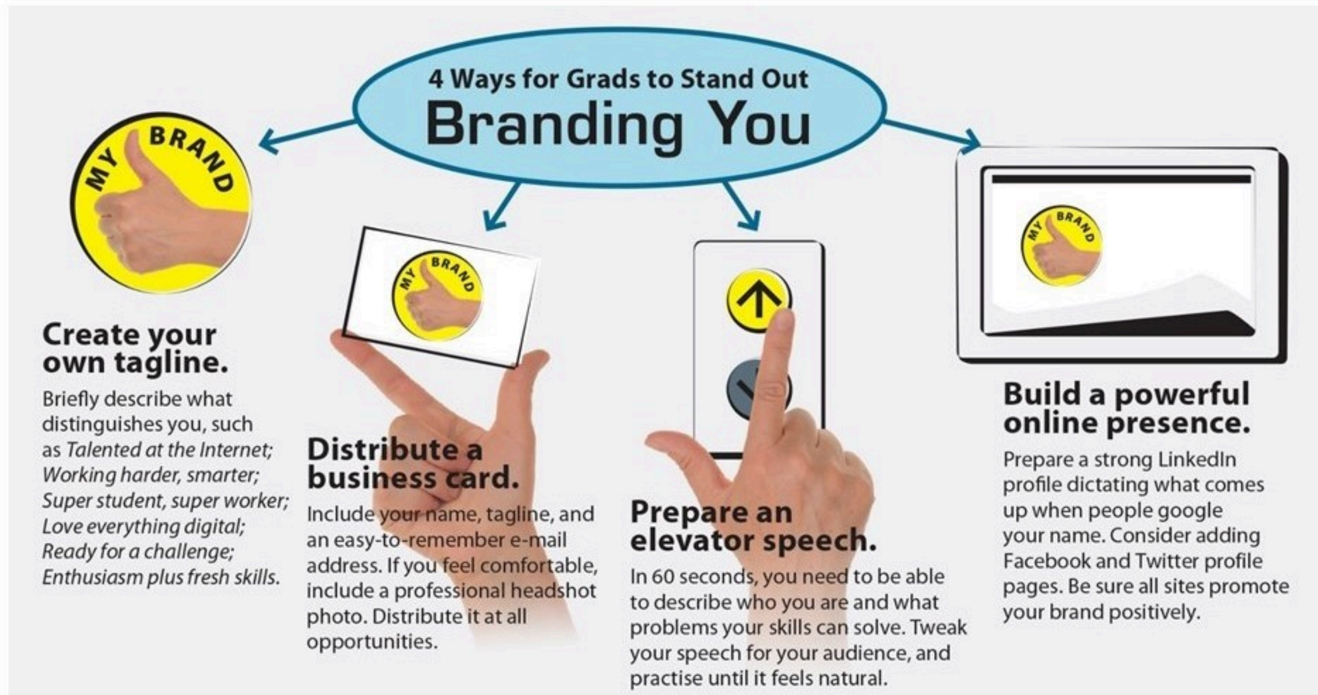

Figure 14.1.2: The four steps in the personal branding process explained. (Business Communication, 2019)

1. Begin developing your network. Conduct at least one referral interview or join one online networking group. Record the results you experienced and the information you learned from the networking options you chose.
2. Use several of the job search engines listed in 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 as assets?

References

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Guffey, M., Loewry, D., & Griffin, E. (2019). *Business communication: Process and product* (6th ed.). Toronto, ON: Nelson Education. Retrieved from http://www.cengage.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9780176531393&template=NELSON

TEDx Talks. (2017). *Designing a personal brand from zero to infinity* [Video]. Youtube. https://www.youtube.com/watch?v=Alqt7pIbp_o

14.2 RESUMES AND COVER LETTERS

JORDAN SMITH

Learning Objectives

After reviewing this information, you will be able to

- understand how to prepare a targeted and persuasive resume and cover letter
- understand the information required in each section of a resume and cover letter
- know how to apply the AIDA writing process to cover letters

INTRODUCTION

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?

The **cover letter** literally covers the résumé and is thus the first thing the hiring manager sees of you. the cover letter plays a key role in convincing a hiring manager 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.

The resume and cover letter work together to put your best your foot forward. These documents are the focus of the information below.

THE RESUME

Can you get to an interview without a resume? In most cases, the résumé is key to the hiring process. Sometimes one writing mistake—even just one little typo 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:

- 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.
- A perfect résumé speaks volumes about how conscientious a job applicant can be about the quality of work the applicant will do. If a résumé is poorly written, the employer can safely expect a similarly poor quality of work if the applicant became an employee.

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 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.

Figure 14.2.1: Top reasons resumes are rejected by hiring managers. ([Liu,](#) n.d.)

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=703#h5p-182

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. Many of these skills are noted in the learning outcomes of your college courses.

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:[1]

- 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?

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.

DEVELOPING YOUR RESUME

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. Your best chance of succeeding is to 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. Along with those marred by glaring errors, generic résumés are the first to go into the shredder.

A targeted résumé, however, is tailored to present 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 and reflects the selection criteria the employer applies to every job application. The employer expects that each section of the resume will prove 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. (Guffey, M. E., Loewy, D., Almonte, R. (2016). *Essentials of business communication* (8th Can. Ed.). Toronto: Nelson. pp. 377-378)

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 [2]. However, 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. Use a standard email address like yourfirstname.lastname@emailprovider.com

RESUME SECTIONS

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.

Personal Information. The personal information header appears at the top of the document. Use your full legal name. Below or beside your name, add your contact information, including your physical mailing address, phone number, and email address. Whatever phone number you give, ensure that the personalized message that a caller hears if they're sent to voicemail is a professional one. Also, don't use your work email address unless your current employer is okay with you using it to look for work elsewhere. Finally, space permitting, include a personal website such as a link to your LinkedIn profile and/or online portfolio

The **Objective** statement should mention the company and position in question. This type of statement confir,s to the employer that the 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. A targeted résumé's Objective statement focuses on what exactly the applicant can do for the employer. See below for an example.

2. Vandegriend, K. (2017, November 30). Hiring manager resume pet peeves, must-haves, and red flags. *Career Story*. Retrieved from http://careerstory.ca/blog/2017/hiring-manager-resume-pet-peeves-must-haves-and-red-flags

Example: *To contribute to an increase in sales at Company XYZ as a top sales representative.*

Skills and Qualification Summary. This 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. 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."

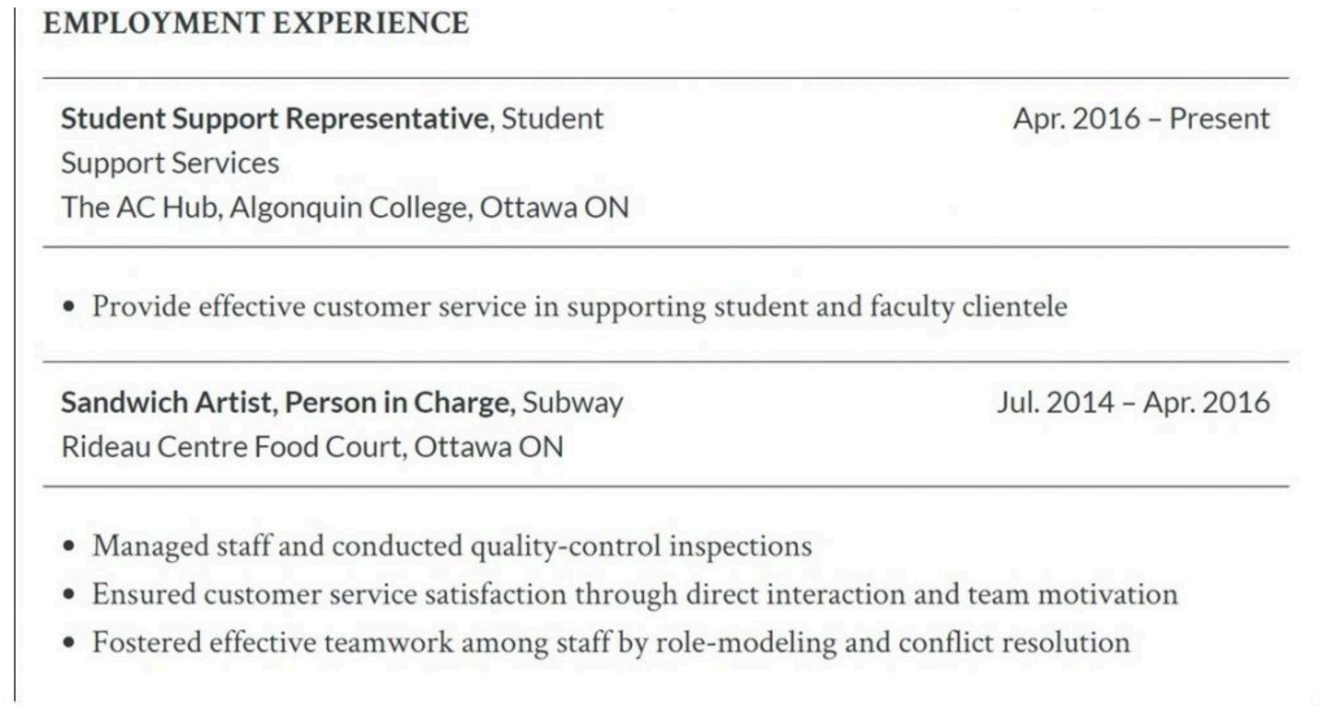
Your Skills and Qualifications Summary section helps you pass the filter that many employers use to scan electronically submitted applications to ensure they've used enough of the job posting's key words. If your application fails to mirror exactly the key terms listed throughout the job posting, the 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. Only do this, however, if you're sure that your application formatting won't be electronically filtered out. Some of the online application services will convert résumés into scannable formats, often scrambling text into an unreadable mess.

Table 14.2.1 provides and example of how to organize a table with categories highlighting your job skills.

Programming Language	Software	Interpersonal
• 3 years' advanced proficiency in C++ • 2 years' intermediate use of C# • 1 year of familiarity with OpenGL	• 3 years' advanced proficiency with 3ds Max • 5 years' functional proficiency with Photoshop • 2 years' familiarity with Java	• Excellent leadership and teamwork skills • Advanced writing and presentation skills • Fully bilingual (reading, writing, speaking) in English and French

Employment Experience. The Employment Experience section follows the same format as the Education section. 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. Figure 48.2 presents a sample employment experience section.



EMPLOYMENT EXPERIENCE

Student Support Representative, Student Support Services — Apr. 2016 – Present
The AC Hub, Algonquin College, Ottawa ON

- Provide effective customer service in supporting student and faculty clientele

Sandwich Artist, Person in Charge, Subway — Jul. 2014 – Apr. 2016
Rideau Centre Food Court, Ottawa ON

- 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 14.2.2: Sample employment experience section that list employment experience in reverse chronological order,

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, 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. 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

Focuses on quantifiable achievements with actual numerical figures and place 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[3]. 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[4].

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. 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[5]. 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.

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.
2. Include a References section with actual entries when applying to a smaller organization that will likely make quick decisions about hiring.

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

3. Guffey, M. E., Loewy, D., Almonte, R. (2016). *Essentials of business communication* (8th Can. Ed.). Toronto: Nelson. p. 387)
4. Block, L. (2014, September 29). My personal formula for a winning resume. *LinkedIn*. Retrieved from https://www.linkedin.com/pulse/20140929001534-24454816-my-personal-formula-for-a-better-resume
5. Vandegriend, K. (2017, November 30). Hiring manager resume pet peeves, must-haves, and red flags. *Career Story*. Retrieved from http://careerstory.ca/blog/2017/hiring-manager-resume-pet-peeves-must-haves-and-red-flags

expect to be the most enthusiastic endorsement down to the least. Do not include coworkers, friends, or family members among your 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.
3. **Phone number** as employers checking references prefer to call, rather than email, so they can have a quick back-and-forth conversation about the candidate.
4. **Email address** to allow the 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).

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.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
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THE COVER LETTER

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

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=703#h5p-184

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

COVER LETTER SECTIONS

Let's look in more detail at how to write each of these four cover letter paragraphs plus surrounding parts.

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, by Google-searching for the company's HR or recruiting personnel, or calling the company to ask whom you can address your application.

Job Opening 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. Employers use job reference numbers to direct applications to the correct competition, especially if the company is large enough to run several at once.

2. **Say where you found out about the job** in the first sentence after naming the job title. If you were recommended by someone in the company, name-dropping works well here. Even if you don't have an "in" from networking, say where you found the job posting or if a recruiter recommended it.

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.

Skills and Qualification 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.

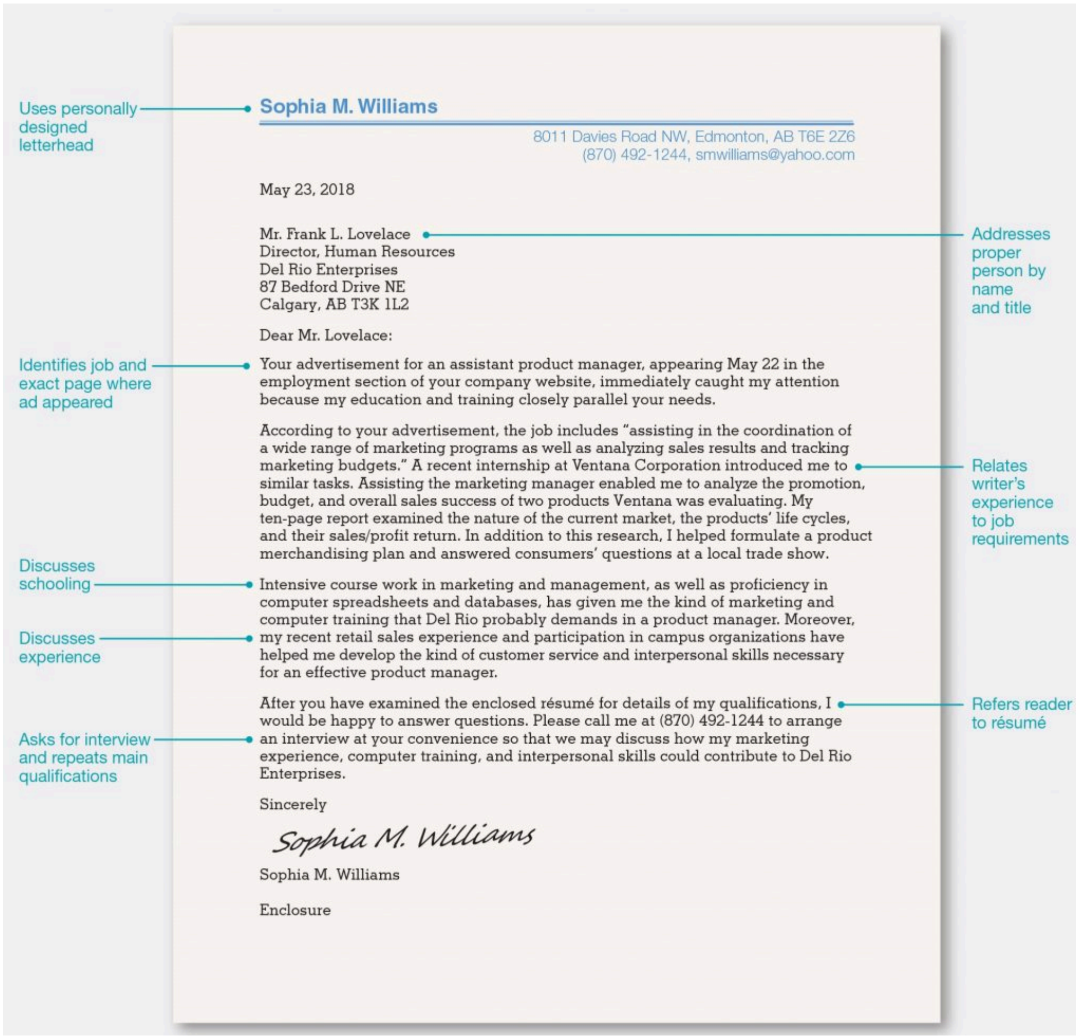
Make the paragraph instead about how you're going to benefit the employer, using those skills to help the company achieve its business goals, which requires knowing and saying what they are. This is why you were advised to research the company at the outset of the application process and note their products and/or services, clientele demographics, and mission/vision statement. 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.

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.

Closing 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.



Sophia M. Williams

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(870) 492-1244, smwilliams@yahoo.com

May 23, 2018

Mr. Frank L. Lovelace
Director, Human Resources
Del Rio Enterprises
87 Bedford Drive NE
Calgary, AB T3K 1L2

Dear Mr. Lovelace:

Your advertisement for an assistant product manager, appearing May 22 in the employment section of your company website, immediately caught my attention because my education and training closely parallel your needs.

According to your advertisement, the job includes "assisting in the coordination of a wide range of marketing programs as well as analyzing sales results and tracking marketing budgets." A recent internship at Ventana Corporation introduced me to similar tasks. Assisting the marketing manager enabled me to analyze the promotion, budget, and overall sales success of two products Ventana was evaluating. My ten-page report examined the nature of the current market, the products' life cycles, and their sales/profit return. In addition to this research, I helped formulate a product merchandising plan and answered consumers' questions at a local trade show.

Intensive course work in marketing and management, as well as proficiency in computer spreadsheets and databases, has given me the kind of marketing and computer training that Del Rio probably demands in a product manager. Moreover, my recent retail sales experience and participation in campus organizations have helped me develop the kind of customer service and interpersonal skills necessary for an effective product manager.

After you have examined the enclosed résumé for details of my qualifications, I would be happy to answer questions. Please call me at (870) 492-1244 to arrange an interview at your convenience so that we may discuss how my marketing experience, computer training, and interpersonal skills could contribute to Del Rio Enterprises.

Sincerely

Sophia M. Williams

Sophia M. Williams

Enclosure

Figure 14.2.3: An image of a solicited cover letter that meets the criteria described above. (Business Communications, 2019)

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/nscccommtrades/?p=703#h5p-185

1. 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.

2. Write an unsolicited cover letter for your dream job. Take the indirect approach and be convincing in how you present your pitch.

References

Business Insider. (2016). *A business insider reveals what an a perfect resume looks like* [Video]. Youtube. https://www.thejobnetwork.com/this-is-why-your-resume-was-rejected-infographic/

Careercake. (2013). *5 steps to an incredible cover letter* [Video]. Youtube. https://www.youtube.com/watch?v=mxOIi8laZos

Liu, J. (n.d.). This is why your resume was rejected [Infographic]. *The job network*. Retrieved from https://www.thejobnetwork.com/this-is-why-your-resume-was-rejected-infographic/

14.3 INTERVIEW SKILLS

JORDAN SMITH

Learning Objectives

After reviewing this information, you will be able to

- discuss the do and don't of employment interviewing.
- understand the three phases of the interview process
- understand how to succeed in each stage of the interview process

INTRODUCTION

We all join communities, teams, and groups across our lifetimes. We go from an unknown outsider to a new member and eventually a full member. Businesses and organizations are communities consisting of teams and groups, and if we decide to switch teams or communities, or if that decision is made for us with a reduction in force layoff, for example, we'll be back on the job market. In order to make the transition from a outsider to an insider, you'll have to pass a series of tests, both informal and formal. One of the most common tests is otherwise known as an employment interview. An employment interview is an exchange between a candidate and a prospective employer (or their representative). It is a formal process with several consistent elements that you can use to guide your preparation.

Employment interviews come in all shapes and sizes, and may not be limited to only one exchange or one interaction. A potential employee may very well be screened by a computer (as the résumé is scanned) and interviewed online or via the telephone before the applicant ever meets a representative or panel of representatives. The screening process may include formal tests that include personality tests, background investigations, and consultations with previous employers. Depending on the type of job you are seeking, you can anticipate answering questions, often more than once, to a series of people as you progress through a formal interview process. Just as you have the advantage of preparing for a speech, you can apply the same research and public speaking skills to the employment interview.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/nscccommtrades/?p=707#h5p-186

Let's examine this process in more detail.

THE INTERVIEW PROCESS

The invitation to interview means you have been identified as a candidate who meets the minimum qualifications and demonstrate potential as a future employee. Your cover letter, résumé, or related application materials may demonstrate the connection between your preparation and the job duties, but now comes the moment where you will need to articulate those points out loud.

If we assume that you would like to be successful in your employment interviewing, then it makes sense to use the communication skills gained to date with the knowledge of interpersonal communication to maximize your performance. There is no one right or wrong way to prepare and present at your interview, just as each audience is unique, but prepare in anticipation of several common elements.

PREPARATION

The right frame of mind is an essential element for success in communication, oral or written. For many, if not most, the employment interview is surrounded with mystery and a degree of fear and trepidation. Just as giving a speech may produce a certain measure of anxiety, you can expect that a job interview will make you nervous. Anticipate this normal response, and use your nervous energy to your benefit. To place your energies where they will be put to best use, the first step is preparation.

Briefly, the employment interview is a conversational exchange (even if it is in writing at first) where the participants try to learn more about each other. Both conversational partners will have goals in terms of content, and explicitly or implicitly across the conversational exchange will be relational messages. Attending to both points will strengthen your performance.

Figure 14.3.1: There are a number of considerations before going into a job interview. (Doyle, 2020)

On the content side, if you have been invited for an interview, you can rest assured that you have met the basic qualifications the employer is looking for. Hopefully, this initiation signal means that the company or organization you have thoroughly researched is one you would consider as a potential employer. Perhaps you have involved colleagues and current employees of the organization in your research process and learned about several of the organization's attractive qualities as well as some of the challenges experienced by the people working there.

Businesses hire people to solve problems, so you will want to focus on how your talents, expertise, and experience can contribute to the organization's need to solve those problems. The more detailed your analysis of their current challenges, the better. You need to be prepared for standard questions about your education and background, but also see the opening in the conversation to discuss the job duties, the challenges inherent in the job, and the ways in which you believe you can meet these challenges. Take the opportunity to demonstrate the fact that you have "done your homework" in researching the company. Table 49.1 "Interview Preparation Checklist" presents a checklist of what you should try to know before you consider yourself prepared for an interview.

Table 14.3.1 Interview Preparation Checklist

What to Know	Examples
Type of Interview	Will it be a behavioral interview, where the employer watches what you do in a given situation? Will you be asked technical ques sample? Or will you be interviewed over lunch or coffee, where your table manners and social skills will be assessed?
Type of Dress	Office attire varies by industry, so stop by the workplace and observe what workers are wearing if you can. If this isn't possible, c resources office what to wear—they will appreciate your wish to be prepared.
Company or Organization	Do a thorough exploration of the company's Web site. If it doesn't have one, look for business listings in the community online ar Contact the local chamber of commerce. At your library, you may have access to subscription sites such as Hoover's Online (http
Job	Carefully read the ad you answered that got you the interview, and memorize what it says about the job and the qualifications tl Use the Internet to find sample job descriptions for your target job title. Make a written list of the job tasks and annotate the list knowledge, and other attributes that will enable you to perform the job tasks with excellence.
Employer's Needs	Check for any items in the news in the past couple of years involving the company name. If it is a small company, the local town n best source. In addition, look for any advertisements the company has placed, as these can give a good indication of the company

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PERFORMANCE

To prepare for an employment interview, research the company, market, and even individuals in your effort to learn more about the opportunity. From this solid base of preparation, you need to begin to prepare your responses. Would you like some of the test questions before the test? Luckily for you, employment interviews involve a degree of uniformity across their many representations. Here are eleven common questions you are likely to be asked in an employment interview[1]

1. Tell me about yourself.
2. Have you ever done this type of work before?

1. McLean, S. (2005). *The basics of interpersonal communication*. Boston, MA: Allyn & Bacon.

3. Why should we hire you?
4. What are your greatest strengths? Weaknesses?
5. Give me an example of a time when you worked under pressure.
6. Tell me about a time you encountered (X) type of problem at work. How did you solve the problem?
7. Why did you leave your last job?
8. How has your education and/or experience prepared you for this job?
9. Why do you want to work here?
10. What are your long-range goals? Where do you see yourself three years from now?
11. Do you have any questions?

When you are asked a question in the interview, look for its purpose as well as its literal meaning. "Tell me about yourself" may sound like an invitation for you to share your text message win in last year's competition, but it is not. The employer is looking for someone who can address their needs. Telling the interviewer about yourself is an opportunity for you make a positive professional impression. Consider what experience you can highlight that aligns well with the job duties and match your response to their needs.

In the same way, responses about your strengths are not an opening to brag, and your weakness not an invitation to confess. If your weakness is a tendency towards perfectionism, and the job you are applying for involves a detail orientation, you can highlight how your weaknesses may serve you well in the position.

Consider using the "because" response whenever you can. A "because" response involves the restatement of the question followed by a statement of how and where you gained education or experience in that area. For example, if you are asked about handling difficult customers, you could answer that you have significant experience in that area because you've served as a customer service representative with X company for X years. You may be able to articulate how you were able to turn an encounter with a frustrated customer into a long-term relationship that benefited both the customer and the organization. Your specific example, and use of a "because" response, can increase the likelihood that the interviewer or audience will recall the specific information you provide.

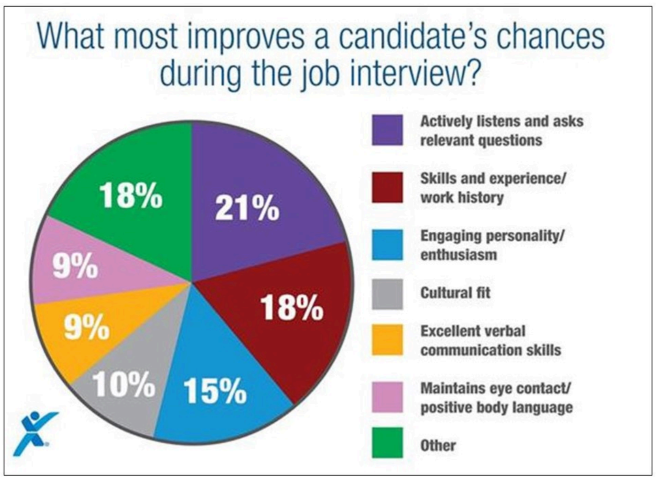

Figure 14.3.2: A survey of 2,169 business leaders reveals that using active listening skills and asking relevant questions improves the chances of securing employment. (GlobalNewswire, 2018).

You may be invited to participate in a conference call, and be told to expect the call will last around twenty minutes. The telephone carries your voice and your words, but doesn't carry any visual cues. If you remember to speak directly into the telephone, look up and smile, your voice will come through clearly, and you will sound competent and pleasant. Whatever you do, don't take the call on a cell phone with an iffy connection—your interviewers are guaranteed to be unfavorably impressed if you keep breaking up during the call. Use the phone to your advantage by preparing responses on note cards or on your computer screen before the call. When the interviewers ask you questions, keep track of the time, limiting each response to about a minute. If you know that a twenty-minute call is scheduled for a certain time, you can anticipate that your phone may ring may be a minute or two late, as interviews are often scheduled in a series while the committee is all together at one time. Even if you only have one interview, your interviewers will have a schedule, and your sensitivity to it can help improve your performance.

You can also anticipate that the last few minutes will be set aside for you to ask your questions. This is your opportunity to learn more about the problems or challenges that the position will be addressing, allowing you a final opportunity to reinforce a positive message with the audience. Keep your questions simple, your attitude positive, and communicate your interest.

At the same time as you are being interviewed, know that you too are interviewing the prospective employer. If you have done your homework you may already know what the organization is all about, but you may still be unsure whether it is the right fit for you. Listen and learn from what is said as well as what is not said, and you will add to your knowledge base for wise decision making in the future.

Above all, be honest, positive, and brief. You may have heard that the world is small and it is true. As you develop professionally, you will come to see how fields, organizations, and companies are interconnected in ways that you cannot anticipate. Your name and reputation are yours to protect and promote.

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POST-PERFORMANCE

You completed your research of the organization, interviewed a couple of employees, learned more about the position, were on time for the interview (virtual or in person), wore neat and professional clothes, and demonstrated professionalism in your brief, informative responses. Congratulations are in order, but so is more work on your part.

Remember that feedback is part of the communication process: follow up promptly with a thank-you note or e-mail, expressing your appreciation for the interviewer's time and interest. You may also indicate that you will call or e-mail next week to see if they have any further questions for you. (Naturally, if you say you will do this, make sure you follow through!) In the event that you have decided the position is not right for you, the employer will appreciate your notifying them without delay. Do this tactfully, keeping in mind that communication occurs between individuals and organizations in ways you cannot predict.

After you have communicated with your interviewer or committee, move on. Candidates sometimes become quite fixated on one position or job and fail to keep their options open. The best person does not always get the job, and the prepared business communicator knows that networking and research is a never-ending, ongoing process. Look over the horizon at the next challenge and begin your research process again. It may be hard work, but getting a job is your job. Budget time and plan on the effort it will take to make the next contact, get the next interview, and continue to explore alternate paths to your goal.

You may receive a letter, note, or voice mail explaining that another candidate's combination of experience and education better matched the job description. If this happens, it is only natural for you to feel disappointed. It is also only natural to want to know why you were not chosen, but be aware that for legal reasons most rejection notifications do not go into detail about why one candidate was hired and another was not. Contacting the company with a request for an explanation can be counterproductive, as it may be interpreted as a "sore loser" response. If there is any possibility that they will keep your name on file for future opportunities, you want to preserve your positive relationship.

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CONCLUSION

Although you feel disappointed, don't focus on the loss or all the hard work you've produced. Instead, focus your energies where they will serve you best. Review the process and learn from the experience, knowing that each audience is unique and even the most prepared candidate may not have been the right "fit." Stay positive and connect with people who support you. Prepare, practice, and perform. Know that you as a person are far more than just a list of job duties. Focus on your skill sets: if they need improvement, consider additional education that will enhance you knowledge and skills. Seek out local resources and keep networking. Have your professional interview attire clean and ready, and focus on what you can control—your preparation and performance.

Exercises

1. Find a job announcement of a position that might interest you after you graduate or reach your professional goal. Write a brief statement of what experience and education you currently have that applies to the position and note what you currently lack
2. What are the common tasks and duties of a job you find interesting? Create a survey, identify people who hold a similar position, and interview them (via e-mail or in person).
3. What has been your employment interview experience to date? Write a brief statement and provide examples.

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14.4 THE ONLINE APPLICATION PROCESS

JORDAN SMITH

Learning Objectives

After reviewing this information, you will be able to

- recognize a number of today's online digital tools and apps
- understand the differences of the online application process

INTRODUCTION

The first reader of a resume may no longer be a person but an **applicant tracking system (ATS)**. Online job boards, social networks, and mobile technology are becoming the engines and a permenant part of the modern day job search process. The number of Apps available to assist job applicants through the job search process are numerous. Thus, knowing how to take advantage of these Apps, how to build your online presence, and how to navigate through the online application process are skills the 21st century job seeker should know. The following video, *How to Apply for a Job Online*, will provide some basic knowledge on the online job application process.

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THE CHANGING APPLICATION PROCESS

Technology is changing the job application process. The way that organizations are looking for candidates, screening resumes, running interviews, and selecting the candidate to hire is changing due to the pervasive nature of technology. Technology, as the video above indicates, removes many obstacles in the hiring process; as a result organizations are utilizing technology to facilitate the seeking and hiring of new employees. In fact, a 2018 survey of trends in the hiring process reveals that

70% of companies have used social media to find and hire and employees and 89% plan to use social media as part of their future hiring process.[1] Figure 14.4.1 below provides additional results from this survey. Consequently, securing a job in the current and future job market will involve understanding the ins and outs of the online application process.

Figure 14.4.1: A 2018 survey revealing the role social media is playing in the online hiring process. ([TalentNow](), 2019).

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https://pressbooks.nscc.ca/nscccommtrades/?p=711#h5p-191

CREATING YOUR ONLINE PRESENCE

Clearly, having or creating an online presence is important in the new dynamic job search environment. Let's examine how to create an impactful online presence.

SOCIAL NETWORK SITES

If you haven't done this yet, create a professionalize web presence by assembling a well-developed LinkedIn profile. This site and other social networking sites offer plenty of advice on how to make the most of social media platforms, 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[2] 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

1. TalentNow. (2019). *Staffing industry trends 2019: Follow the changing industry dynamics*. Retrieved from https://www.talentnow.com/staffing-industry-trends-2018-follow-the-changing-industry-dynamics/
2. Doyle, A. (2018) How to Use LinkedIn Effectively. The Balance Careers. https://www.thebalancecareers.com/how-to-use-linkedin-2062597

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 online 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, 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.

RESUME (ONLINE CONSIDERATIONS)

Yes, the resume is still very important for the online application process. The more closely your resume matches what an employer's applicant tracking system (ATS) is looking for, the better your chance of landing an interview and getting the job. Using key word from job postings is always a good strategy, but modern ATSs are also screening for additional qualities. Ensuring your online resume contains the following characteristics improves the probability that your resume will be selected by an ATS.

- Using keywords is good, but using key words in context is better. That is, use the keyword in a manner that ensure the ATS will recognize the skill noted as desirable.
- Focusing on nouns will attract the attention of hiring managers. The ATS looks for three types of nouns:
    - job titles, positions or roles
    - technical skills or specializations
    - certification, tools used, or specific experience
- Varying the job title to ensure ATS recognition
- Concentrating on skills section to ensure it responds to desired skills
- Keeping the resume format simple facilitates easy translation to an online format. Converting the basic resume to a plain-text is advisable
- Using conventional headings will increase ATS recognition

E-PORTFOLIOS

An **e-portfolio** provides an opportunity for job seekers to present their skills and talents in a very tangible manner. An e-portfolio allows the job seeker to provide a basic resume containing links to projects, assignments, videos, social media sites (e.g. LinkedIn) to provide a comprehensive overview of their skills and personality for prospective employers.

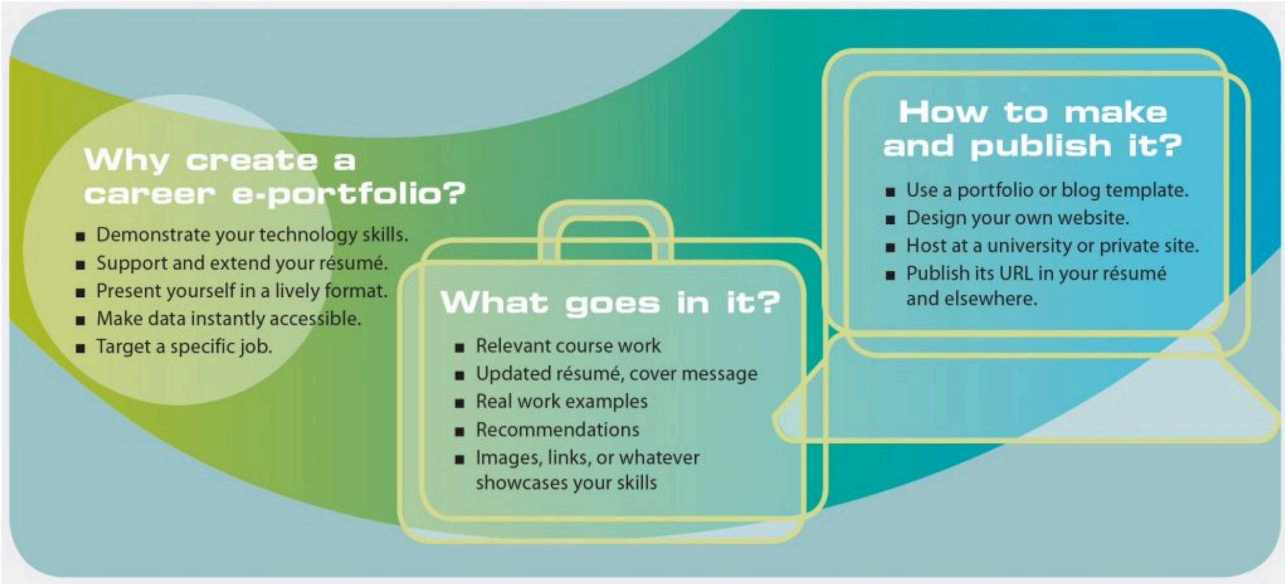

Figure 14.4.2: The why, what, and how of developing an e-portfolio. (Business Communications, 2019)

Video Resumes

Finally, another vehicle for an online job application is the video resume. A video resume allows job applicants to present their skills, qualification, and unique interests in a visual manner. With the availability of video and video editing apps, creating a video resume is well within the capabilities of most college students. Three skills in particular that highlighted through this medium: speaking, presentation, and technical skills. For a job requiring such skills, a well produced video resume provides an advantage over those applicants who apply in the more traditional manner. Here are some tips to create a video resume:

- Customize the video content to respond to or match the specific job opening applied for
- Keep the video resume to 1 – 3 minutes
- Dress professionally and appropriately
- Explain why you are the best candidate for the job

The following video provides a few more tips on creating a professional video resume.

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https://pressbooks.nscc.ca/nscccommtrades/?p=711#h5p-192

An interactive H5P element has been excluded from this version of the text. You can view it online here:
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CONCLUSION

The job application process is experiencing a dynamic evolution. In addition to the traditional job application process, a variety of online apps and other tools provide the motivated job seeker a huge selection of resources to stand out in a very crowded job market. These are really exciting times for job seekers willing to use these tools in the online application process.

Exercises

1. Become familiar with LinkedIn by setting up an account and completing a profile. Even if you are not in the job market yet, becoming familiar with LinkedIn can open your eyes to the kinds of information employers seek and also give you practice at filling in templates such as those in the ATS. The easiest way to begin is to view a LinkedIn video taking you through the steps in creating a profile.

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Work It Daily. (2017). *How to apply for a job online* [Video]. Youtube. https://www.youtube.com/watch?v=W-2f5UKQdJ0

14.5 KEY TAKEAWAYS – EMPLOYMENT SKILLS

JORDAN SMITH

Key Takeaway

The following are a few of the most important elements to remember about the employment process in the digital age.

Key takeaways for today's job applicant include

- Begin the job search process by exploring your interests, evaluating your qualifications, and investigating career opportunities.
- Develop a targeted résumé that is *perfect* in the quality of its content, organization, writing, and overall presentation to increase your chances of getting interviews and hence the jobs.
- Prepare a winning cover letter and résumé by assessing your skills and researching what employers are looking for, what jobs are available, and how to find and apply to them.
- Write a cover letter as part of your targeted approach to applying for job competitions; use it to identify the job by name, introduce your résumé, explain how you'll apply your skills in the job, and request an interview.
- Prepare for the pre-interview, interview, and post-interview process.
- Optimize the job search process and your chances of getting hired by taking advantage of today's digital tools and apps.

VERSION HISTORY

NSCC Communication Skills for Trades is an adapted work drawing primarily from Communication Skills by Jordan Smith. Five open textbook titles were used to create the new NSCC edition. See below for chapter mapping.

1. Communication Skills: NSCC Edition by Jordan Smith and NSCC is licensed under a Creative Commons Attribution 4.0 International License,
2. Professional Communications by Jordan Smith, Melissa Ashman, eCampusOntario, Brian Dunphy, and Andrew Stracuzzi licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License.
3. Technical Writing Essentials by Suzan Last licensed under a Creative Commons Attribution 4.0 International License.
4. Making Conflict Suck Less: The Basics by ashleyorme licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License.
5. Communication and Mentoring in the Trades by Tim Carson licensed under a Creative Commons Attribution 4.0 International License.

NSCC Communication Skills for Trades Chapter Mapping

NSCC Version	Communication Skills	Professional Communication	Technical Writing	Making Conflict Suck Less	Communicating and Mentoring in the Trades
Chapter 1	Unit 1				
	Unit 2				
	Unit 3				
		Part I Unit 1 Chapter 1 Section 1.5			
Chapter 2			Introduction and Chapter 1 [except section 1.5]		
Chapter 3	Unit 4				
	Unit 5				
	Unit 6				
Chapter 4	Unit 7				
	Unit 8				
		PartII Unit 2 Chapter3 Section 3.3			
	Unit 9				
	Unit 10				
Chapter 5	Unit 11				
	Unit 12				
	Unit 13				
	Unit 14				
	Unit 15				
Chapter 6	Unit 24				
	Unit 25				
	Unit 26				
	Unit 27				
Chapter 7	Unit 18				
	Unit 19				
	Unit 20				

Chapter 8	Unit 21				
	Unit 22				
Chapter 9			Chapter 7		
			7.2		
			7.3		
			7.4		
			7.5		
			7.7		
Chapter 10	Unit 37				
	Unit 38				
	Unit 39				
	Unit 40				
	Unit 41				
	Unit 42				
	Unit 43				
	Unit 23				
Chapter 11	Unit 32				
	Unit 33				
	Unit 34				
	Unit 35				
	Unit 36				
Chapter 12	Unit 29				
	Unit 30				
	Unit 31				
					Tool Box Meetings
Chapter 13		Part IV Unit3 Chapter10 Stn 10.1			
	Unit 43				
				Chapter 3	
	Unit 44				
	Unit 45				

Chapter 14	Chapter 13: Employment Skills Introduction Unit 47 Unit 48 Unit 49 Unit 50				

VERSION HISTORY FOR EARLIER EDITIONS

The book *Communication Skills* by Jordan Smith is adopted from the following works:

Communication @ Work was adapted for Seneca College by Tom Bartsiokas, Robin Potter, and Tricia Hylton using the open textbook Communication at Work: A College-to-Career Guide to Success (2019). Both works have a CC BY Licence.

Communication at Work: A College-to-Career Guide to Success (2019) was created by Jordan Smith and is a partial adaption from Business Communication for Success (2015) Licenced under CC By-NC-SA.

LONG DESCRIPTIONS

NSCC

IMAGE DESCRIPTION

UNIT 1

Figure 1 image description:
Once there is an idea, a project goes through a design process made up of four stages.

1. Pre-project planning.
    - Problem Definition – identifying needs, goals, objectives, and constraints.
    - Define context and do research.
    - Identify potential projects.
    - Public engagement projects; Stakeholder consultation.
2. Project Development.
    - Propose a project (budget, timeline, etc.).
    - Create or respond to a request for proposals, evaluate proposals.
    - Develop or design solution concepts.
    - Project management plan.
    - Feasibility Studies, Recommendation Reports).
3. Project Implementation.
    - Write contracts and apply for permits for construction and building sites.
    - Progress reports, status updates.
    - Documentation of project.
    - Continued research and design improvements.
4. Project completion.

- Final reports and documentation.
- Close contracts.
- Ongoing Support: User Guides, Troubleshooting, FAQs.

[Return to Figure 1]

UNIT 2.6

Figure 1.5.1 image description:
A design process flow chart that encourages you to revisit previous steps as needed.

1. **Define the problem.** This involves a needs assessment, problem statement, designing criteria and goals and background research.
2. **Generate possible solutions.** Brainstorming using the idea trigger method, thumbnail sketching, and creative thinking. At this point, you may need to revisit your problem definition. Once you have a number of possible solutions, move on to the next step.
3. **Evaluate possible solutions.** Do ideas meet design criteria? List the advantages and disadvantages. Select the best design alternatives. Use a decision matrix to evaluation. At this point, you may need to revisit your problem definition or brainstorm some more. Once you have evaluated possible solutions, move on to the next step.
4. **Make and test a model.** Create detailed technical drawings, prototype or scale model, mathematical and computer models, Conduct performance and user tests. At this point, you made need to go back to brainstorming solutions or evaluating possible solutions. Once you have a model you are happy with, move on to the next step.
5. **Modify and improve design.** Fix problems, improve design, do more testing if needed. In the worse case, scrap the design. You may need to go back to evaluating possible solutions to making and testing the model. Once you have a design you are happy with, move on to the next step.
6. **Communicate final design.** Create final technical drawings, and technical manuals for assembly, operation, and maintenance.

[Return to Figure 1.5.1]

Figure 1.5.2 image description:
A writing process diagram that encourages constantly revisiting previous stages.

1. **Prewriting.** This stage is for generating ideas, understanding the ideas of others, and collecting information (note taking, free-writing, brainstorming, looping).
2. **Planning.** Here, you are organizing and focusing ideas. This may involve mind mapping, clustering, listing, and creating outlines.
3. **Drafting.** In the drafting stage you are writing initial drafts of a text focusing mainly on the development, organization, and elaboration of ideas.
4. **Reflection.** In the reflection stage, you can let the work sit and come back to it at a later point. You may cycle back between drafting a reflection a number of times before moving on.

5. **Peer/tutor review.** Now you can get feedback from others. This may require you to return to the drafting and reflecting stages.
6. **Revision.** Here you are further developing and clarifying ideas and the structure of the text. This may require you to return to the drafting and reflecting stages. If the work requires additional research or idea generation, return to the planning stage.
7. **Editing and proofreading.** Here the focus is on surface-level features of the text.

[Return to Figure 1.5.2]

Unit 9.2

Figure 9.2.1 image Long description:

Once there is an idea, a project goes through a design process made up of four stages.

1. Pre-project planning.
   - Problem Definition – identifying needs, goals, objectives, and constraints.
   - Define context and do research.
   - Identify potential projects.
   - Public engagement projects; Stakeholder consultation.
2. Project Development.
   - Propose a project (budget, timeline, etc.).
   - Create or respond to a request for proposals, evaluate proposals.
   - Develop or design solution concepts.
   - Project management plan.
   - Feasibility Studies, Recommendation Reports).
3. Project Implementation.
   - Write contracts and apply for permits for construction and building sites.
   - Progress reports, status updates.
   - Documentation of project.
   - Continued research and design improvements.
4. Project completion.
   - Final reports and documentation.
   - Close contracts.
   - Ongoing Support: User Guides, Troubleshooting, FAQs.

[Return to Figure 9.2.1]