

TECHNICAL REPORTING (NWTC)



Technical Reporting

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TABLE OF CONTENTS

[Licensing](#)

[Publisher Information](#)

[Chapter 1: Introduction to Technical and Report Writing](#)

[Chapter 2: Document Design](#)

[Chapter 3: Ethical and Legal Obligations](#)

[Chapter 4: Writing Definitions, Descriptions, and Instructions](#)

[Chapter 5: Collaboration](#)

[Chapter 6: Proposals](#)

[Chapter 7: Formal Reports](#)

[Chapter 8: Oral Reports](#)

[Appendix A- Research](#)

[Appendix B- Punctuation, Grammar, and Conventions of English](#)

[Index](#)

[Glossary](#)

[Detailed Licensing](#)

Licensing

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Publisher Information

1

This textbook includes 5 chapters from Bay College's *Eng 145 Technical and Report Writing* (originally numbered 1, 2, 4, 5, and 6), 3 sections from *Workplace Writing: A Handbook for Common Workplace Genres and Professional Writing* (pages 56-78), and 2 units of *Professional and Technical Writing* (originally numbered 7 and 8).

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Chapter 1: Introduction to Technical and Report Writing

Bay College

Learning Objectives

What is Technical Writing? ^[1]

You're probably wondering what this "technical writing thing" is. Someone may even have told you, "It's this course where they make you write about rocket science and brain surgery." Well, not really, as you will see in a moment. Actually, the field of technical communication is essential in a wide range of fields and occupations. It is a fully professional field with degree programs, certifications, and—yes!—even theory. It's a good field with a lot of growth and income potential; and an introductory technical-writing course for which this book has been developed is a good way to start if you are interested in a career in this field.

Technical writing is an audience-centered means of communication that provides a reader with clear and easy access to information. In the business world, time equates to profit, and profit is the force behind all business interaction. The technical writer and reader have a vis-à-vis relationship. The writer recognizes, respects, and addresses the importance of time in effective and efficient communication by providing documents written in specific formats, using unambiguous language to send clearly accessible information. The reader in turn thoroughly understands the information in order to give a thoughtful response.

The Meaning of "Technical"

Technical communication—or technical writing, as the course is often called—is not writing about a specific technical topic such as computers, but about any technical topic. The term "technical" refers to knowledge that is not widespread, that is more the territory of experts and specialists. Whatever your major is, you are developing an expertise—you are becoming a specialist in a particular technical area. And whenever you try to write or say anything about your field, you are engaged in technical communication.

Academic Writing Versus Technical Writing

The definite purpose, strict format and use of appropriate language in technical writing define the differences between technical writing and academic writing. The academic writer's purpose may be to write an assignment, a story, a letter, etc.. These works may or may not have a reader. However, technical writing always has a definite purpose and will always have a reader. Regardless of the number of the intended readers of a document who may or may not read the document, the document will be read by the primary reader.

Workplace Writing

However, the focus for technical-writing courses is not necessarily a career as a technical writer but an introduction to the kinds of writing skills you need in practically any technically oriented professional job. No matter what sort of professional work you do, you're likely to do lots of writing—and much of it technical in nature. The more you know about some basic technical-writing skills, which are covered in this guide and in technical-writing courses, the better job of writing you're likely to do. And that will be good for the projects you work on, for the organizations you work in, and—most of all—good for you and your career.

Really Technical Writing

Keep relaxing, but you should know that professional technical writers do in fact write about very technical stuff—information that they cannot begin to master unless they go back for a Ph.D. But wait a minute! The technical documents have to ship with the product in less than nine months! How do they manage? Professional technical writers rely on these strategies to ensure the technical accuracy of their work:

- Study of books, articles, reports, websites related to the product
- Product specifications: what the product is supposed to do, how it is designed

- Interviews with subject matter experts: the product specialists, developers, engineers
- Product meetings during the development cycle
- Live demonstrations of the product
- Familiarization with similar, competing products
- Experimenting with working models of the product
- Most importantly, subject matter experts' review of technical writers' work for technical accuracy and completeness

Of course, experienced technical writers will tell you that product development moves so fast that specifications are not always possible and that working models of the product are rarely available. That's why the subject matter experts' review is often the most important.

Considerations of Technical Documents

There are key components of what makes a document strong. Therefore, writers keep these items in mind while constructing technical documents.

The Importance of Audience

Another key part of the definition of technical communication is the receiver of the information—the audience. Technical communication is the delivery of technical information to readers (or listeners or viewers) in a manner that is adapted to their needs, level of understanding, and background. In fact, this audience element is so important that it is one of the cornerstones of this course: you are challenged to write about highly technical subjects but in a way that a beginner—a nonspecialist—could understand. This ability to “translate” technical information to non-specialists is a key skill to any technical communicator. In a world of rapid technological development, people are constantly falling behind and becoming technological illiterates. Technology companies are constantly struggling to find effective ways to help customers or potential customers understand the advantages or the operation of their new products.

Not only is the level at which you write important but so are the language choices you make as you do so. Please review the information on the following link for tips: [Use Language that is Sensitive to Your Audience](#)^[2]

So relax! You don't have to write about computers or rocket science—write about the area of technical specialization you know or are learning about. Also, plan to write about it in such a way that even Grandad can understand!

Formatting and Language

Formatting and appropriate language are the basic design elements of all technical documents. A format that shows a hierarchical structure and a coordinate structure of information leads the reader through text.

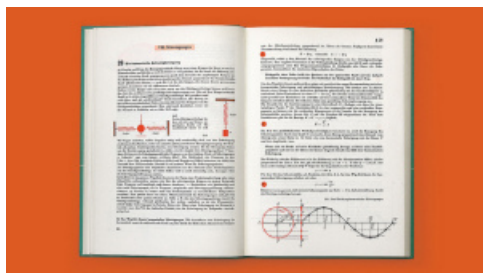


Figure 1 Reader friendly format

Readers should be able to identify a writer's organizational pattern very quickly when reading a technical document. This sometimes refers to a document being “reader friendly.” In addition, using appropriate language is significant in providing the reader with a thorough understanding of the purpose of the document, how the document relates to the reader's needs, and what action is expected of the reader.^[3]

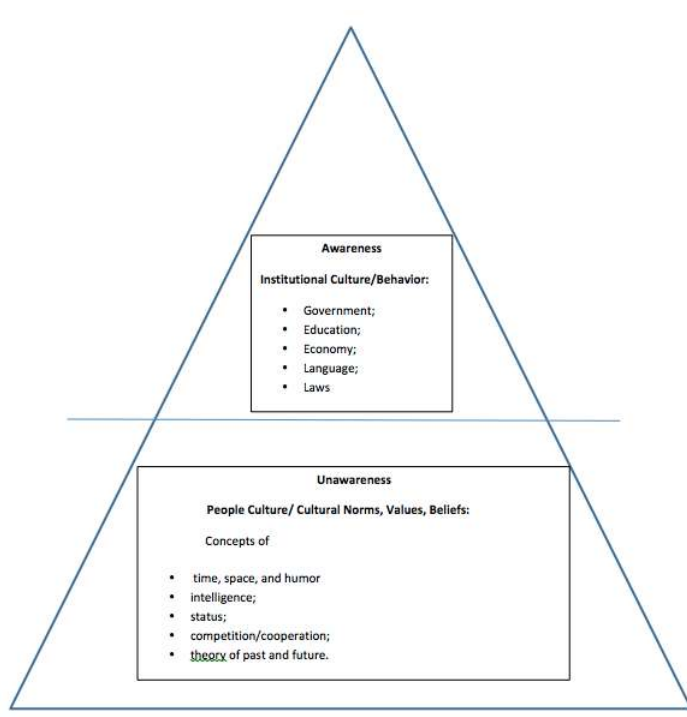
A document may also have one reader (the primary reader) or several readers (the secondary readers). A primary reader is the person who ordered the report to be written or the person for whom a report is intended. These readers will usually read the entire report. Secondary readers are those readers who will read only the sections of the report that relate to them, their jobs, their departments, responsibilities, etc. For example, if a report was sent that detailed funding for different departments, a piping superintendent may only want to read the section that relates to piping. This is where format, the use of headings, is significant in

allowing the reader easy access to information. When the piping superintendent can scan through the document and clearly find the heading that identifies his department saves time.

Cultural Communication

Technical writers need to be aware of the differences between the behavior and the norms, beliefs and values of specific cultural. According to Edward T. Hall and Mildred Reed Hall, In Understanding Cultural Differences, each culture operates according to its own rules (1990, pp. 3-4). Hall and Hall add that problems occur when members of one culture apply the rules to another culture (1990, pp. 3-4). To communicate effectively with other cultures, the technical writer needs to not only be aware of rules governing behaviors that can be observed but also of the not-so-obvious rules that govern the norms, beliefs, and values of the people of a culture. The invisible rules of a culture dramatically impact the acceptance of ideas, plans, and strategies. The Cultural Iceberg illustrates patterns of world communication, showing indicators of Institutional Culture (the obvious behavior of a culture), which can be clearly seen as the tip of the iceberg, and People Culture (the norms, beliefs and values of a culture), which cannot be seen and which are the barriers to successful communication.

Figure 2 The Cultural Iceberg



Ethics ^[4]

Technical writers have a responsibility to their readers and to their employers to follow ethics when writing reports.



Technical writers must use words that demonstrate valid appeals to reason, avoiding emotional words and phrases that appeal to basic emotion instead of justifiable reasoning. In addition, technical writers must use valid references to support ideas and strategies, avoiding referencing non experts to sway readers' support. Also, technical writers must use accurate numbers to report data, avoiding charts and tables that skew data. Using any type of fallacies in technical writing is unethical and could result in dire consequences.

Not only do technical writers have a responsibility to report accurate information, but they also have a responsibility to credit accurate sources of information. At no time is it acceptable to rearrange information in order to attempt to indicate that the writer is the source of someone else's idea or to indicate that the writer read a report that included information he/she cited, when the primary source of the information was cited in another report. All sources must be referenced accurately in the text and cited on a reference page.

Daniel G. Riordan (2005), in *Technical Report Writing Today*, cites Dombrowski to define three threads of ethics:

One major thread is that the communicator must be a good person who cares for the audience. Communicators must tell the truth as convincingly as possible, because truth will lead to the good of the audience. Another thread is that the communicator must do what is right, regardless of possible outcomes. A third thread is that communicators must act for the greatest good for the greatest number of people (p. 16).

In addition, Riordan (2005) references the “code of ethics of the Society for Technical Writers, and cites five of the code’s tenants:

My commitment to professional excellence and ethical behaviors means that I will...

- Use language and visuals with precision.
- Prefer simple direct expression of ideas.
- Satisfy the audience’s need for information, not my own need for self-expression.
- Hold myself responsible for how well my audience understands my message.
- Report the work of colleagues, knowing that a communication problem may have more than one solution (Riordan, 2005, pp. 15-16).

References

Hall, E. T. & Hall, M. R. (1990). *Understanding Cultural Differences*. Yardmouth: Intercultural Press, Inc.

Riordan, D. G. (2005). *Technical Report Writing Today*. Boston: Houghton Mifflin Company.

Visuals & Readability

To make a document more reader friendly, many technical writers rely on visuals to achieve this goal. ^[5] *For example, labels, callouts and captions are identifying text for graphics.* Labels and callouts identify specific elements or features on a graphic; whereas captions are short phrases or sentences that describe the graphic. Notes, or footnotes, explain, or give credit.

Labels and Callouts

To identify specific elements or features, labels and captions are placed directly on the graphic or near it. “Although the terms are used interchangeably, labels are text identifiers that are self-explanatory in an image, while callouts are labels that require further information outside the image to explain what they are identifying” (Gurak 304). They supplement the visual information. But use them selectively; use them only if readers need them (Rude 116).

The advantage of labels is that the reader gains a basic understanding of elements in the graphic without referring to supplementary explanations. But, too many labels obscure the image. In this case, callouts are the better option. Use numbers or letters to identify each element and the supplementary explanations.

Guidelines for Creating Labels and Callouts

- Determine the number of items to identify in the image (Gurak 308).
- Estimate how much explanation each item requires to determine if labels or callouts are more appropriate (Gurak 308).
- When writing labels and callouts,
 - create a consistent visual style (Gurak 308)
 - use the same terms on the label or callout as in the text (Rude 116)
 - in general, all parts mentioned in the text should have a label or callout, and all parts with a label or callout should be mentioned in the text. (Rude 116)
- Layout the labels or callouts next to the elements in the graphic they identify, using a line to connect the two, if necessary.
 - Use a standard font and size for readability (Rude 116)
 - Align the labels and callouts for a neater appearance (Rude 116)
- If callouts are used, place the explanatory text in a key next to the graphic.

Labels

Labels can take different forms (Gurak 304 – 306):

- They may be placed directly on the graphic (whereby they become part of the graphic).
- They may be placed around the graphic and use lines to point to the relevant element in the graphic.
- Online, labels can be links or hotspots whereby more information about the element is displayed on mouse rollover.

This is an example of labels placed directly on the graphic.



Figure 3 Map of the West Side Central Park, NYC between 102nd and 110th Streets.

Here, the labels are placed around the graphic.

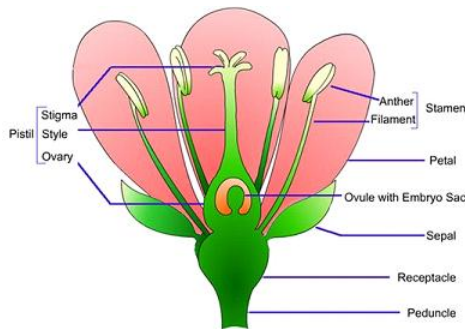


Figure 4 Parts of a flower.

In this sample, when the mouse is rolled over the 'Firebox' label, the text will read:

"Literally a box containing the fire. It is surrounded by water on the top and all sides. The bottom is a grate with an ash pan below that." Additional information is displayed.

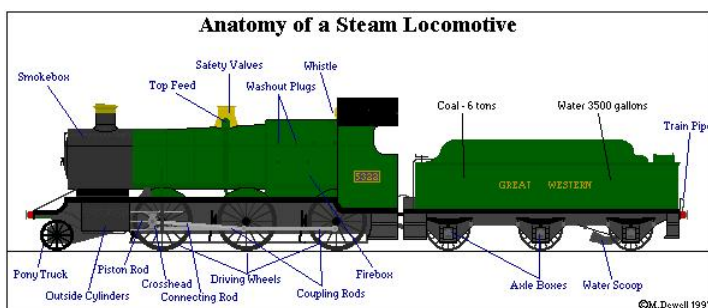


Figure 5 Labels as hotspots.

Callouts

Callouts are best used when many parts of the image need to be labeled and each part requires a longer explanation. In fact, the label sequence may be in alphabetical or numerical (as in Figure 6) order. Ensure that the explanation is near the graphic.

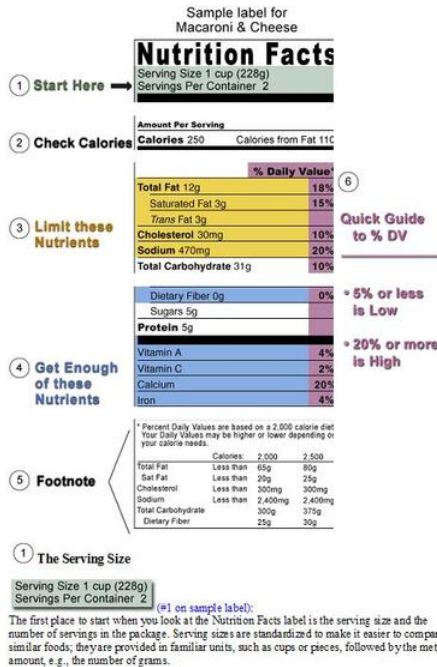


Figure 6. How to understand and use the Nutrition Facts Label.

Coded callouts are in numerical sequence; the explanation for each number appears below the graphic. The example above shows part of the explanation of Number 1 explanation only.

Captions

Captions, table, and graphics titles must clearly identify information to the reader. Interpretive captions usually require one or more sentences. Captions should be informational, without becoming too lengthy. Captions that are merely a title for a graphic are not very helpful (Franklin 96).

Writing Style for Captions

- Captions for graphics include the title and any explanatory material, immediately under the graphic.
- Words such as Figure, Illustration, and Table should be in bold type.
- The caption should be italicized.
- Treat tables and figures the same.

Good captions are what guide readers not only to see, but also to understand. Captions label graphics with titles and explain to readers what they are seeing, and how to interpret the information captured in the visual. The Franklin Covey Style Guide for Business and Technical Communication provides an excellent source for writing captions (Franklin 39 – 41).

Five Specific Style Rules

- **Use interpretive captions** whenever possible. Interpretive captions provide both a title and explanatory information, usually expressed in a complete sentence, to help readers understand the central point(s) that the writer wants to convey. A graphic and its caption should be clear and understandable without requiring readers to search for clarifying information in the text:
 - **Figure 4. Cabin-Temperature Control System.** Constant cabin temperature control is maintained by the system's modulated cabin sensor.
 - This interpretive caption gives the title and then tells the reader the principle message – that the check valve provides near-zero risk. And, it states how the check valve provides near-zero risk (Franklin 39).
 - **Figure 23. Check Valve.** The risk of bad air entering the changer is near zero because the check valve permits air flow in one direction only.

- This interpretive caption gives the title of the figure and emphasizes that the cabin has a constant temperature – a benefit provided by the feature described in the figure. The caption states clearly what the writer wants the reader to learn from the drawing (Franklin 39).
- **Avoid using short, often ambiguous, titles** to replace interpretive captions. In the past, styles for technical and scientific documents used only short, simple title captions for visuals. These were often superfluous, providing no real information other than the obvious to the reader, i.e. – A Horse. Titles that are so short and cryptic that they sound telegraphic are not useful. Such captions are only useful when the graphics are self-explanatory, and require no interpretation (Franklin 40).
- **Number figures and tables sequentially** throughout the document, and place the number before the caption. If an important figure or table is presented twice, treat it as two separate visuals and number each. Figure and table numbers should be whole numbers (Franklin 40).
- **Use periods** following interpretive captions but no punctuation following short captions that are not sentences. Interpretive captions are usually complete sentences and should therefore end with a period. Short captions, like titles and headings, are not usually complete sentences, so they require no punctuation (Franklin 41).
 - Captions may appear below or above a visual, but consistency throughout a document is critical. Arguments support both options; choose one, warrant your choice, and be consistent.
- **Put the caption above the visual** for better visibility when captions are used with slides and other project visual aids. Captions placed at the bottom may be blocked by the heads of those seated in front (Franklin 99).

Notes

Notes or footnotes are categorized as either explanatory or source notes. Explanatory footnotes are identified by a superscript number or letter. The order in which notes appear is important; explanatory footnotes are placed above source notes. And both are placed above the caption, if the caption is placed at the bottom of the illustration.

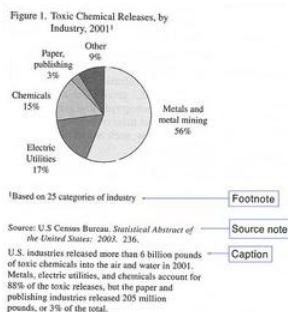


Figure 7. Placement of footnote, source note and caption.

Source: Rude, p. 115, modified.

The Writing Process ^[6]

Writing, especially when compiling a larger document, is not something you sit down, complete in one session, and quickly submit. This is especially true when writing for the workplace where accuracy and clarity are necessary. In fact, writing should be seen as a process that is recursive where the writer moves in and out of various stages of writing and often times revisits some of the stages. The writing process might consist of the following:

Prewriting

This is the planning done before writing a document. It may be defining the purpose of the task, analyzing the primary and secondary readers, sketching the document and what will go in each section, or gathering research.

Drafting

This is writing and compiling a first draft of the document. Sometimes, the writer worries more about getting ideas down more than guaranteeing every punctuation or grammar choice is correct.

Revising

When a writer revises, a writer revisits the draft and makes substantial changes to it. This is more than editing. It is adding, deleting, and moving entire sections of the document around to prepare it as a final, comprehensive document. In fact, it is here that many writers ask others for feedback before revising to ensure that another, unbiased set of eyes have looked over the document and easily understand it.

Editing

This is the final part of the process. It is reading through the document several times while looking for clarity, consistency, and accuracy. In fact, consider reading your document aloud and listening to it as you do so instead of reading and “seeing” it. Most individuals communicate mostly through talking and listening. Therefore, when you read aloud, you can hear if something in your document doesn’t sound right and then correct it. You should be able to read it in a way that it is understandable and sounds conversational.

For additional information on the writing process, visit The Writing Center website for the University of Texas: [University of Texas Writing Center & The Writing Process](#).

Using a process in the workplace and in our class will strengthen your documents significantly. In fact, remember that your documents reflect on who you are as student, technical writer, employee, and even researcher.

References

[1] Technical Writing. Authored by: Dr. Elizabeth Lohman. Provided by: Tidewater Community College. Located at: <http://www.tcc.edu/>. Project: Z Degree Program. License: CC BY: Attribution, edited by *Amber Kinonen*, edits included in italics

[2] Use Language that is Sensitive to Your Audience. Provided by: Writing Commons. Located at: <http://writingcommons.org/open-text/collaboration/143-common-comments/word-choice-/575-use-language-that-is-sensitive-to-your-audience>. License: CC BY-NC-ND: Attribution-NonCommercial-NoDerivatives edited by *Amber Kinonen*, edits included in italics

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[5] Norbert Elliot’s “Labels, Callouts, Captions and Notes” CC-BY Saylor, edited by *Amber Kinonen*, edits included in italics

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Chapter 2: Document Design

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Learning Objectives

What is Document Design?

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

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

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

How Readers Navigate a Document

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

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

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

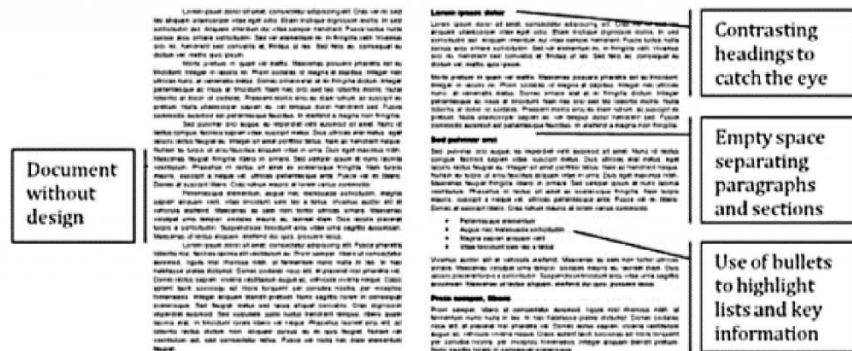


Figure 8. Design practices (right) sorts groups of information into visually distinct blocks, uses contrasting headings, and lists to make information more accessible than paragraph structure alone could make it.

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

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

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

Principles of Design

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

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

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

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

Contrast

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

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

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

- Pair serif and sans-serif fonts.
- Bold or italicize your headings.

- Increase the size of the heading font.
- Align the heading further left than the body font.

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

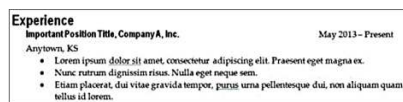


Figure 9. The “Experience” heading in this résumé is offset from the body text using a contrasting sans-serif font, bold style, larger size, and a different alignment.

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

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

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

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

Writing Accurate Headings

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

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

1. Descriptive (not vague, and accurately describes the content)
 - Vague—“Eating Crickets”
 - More Specific—“Raising Crickets for Human Consumption”
2. Parallel in structure
 - Weak—“Market Opportunities,” “Possible Investors,” “What a Location Needs”
 - Better—“Market Analysis,” “Possible Investors,” “Location Requirements”
3. A reasonable length for quick scanning
 - Too Long—“Ways to Raise Crickets and Costs Associated with Each”
 - Better—“Cricket Raising Methods”

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

Proximity

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

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

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



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

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

When you use empty space to separate paragraphs, it’s called block paragraph format. This format is common in correspondence and on web pages. It’s the most frequently used formatting structure in workplace communication because it applies proximity (via empty space) to make each paragraph a visually distinct unit.

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

Difference from Writing in School

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

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

Alignment

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

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

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

Accessible Lists

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

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

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

Non-parallel List	Parallel List (Preferred)
Office Assistant, ABC, Inc. Manhattan, KS • <u>Edit and design</u> the bi-monthly newsletter distributed to shareholders • Responsible for <u>assuring</u> employees input time sheets on time • One year experience <u>managing</u> web updates	Office Assistant, ABC, Inc. Manhattan, KS • <u>Edit and design</u> the bi-monthly newsletter distributed to shareholders • <u>Assured</u> employees input time sheets on time • <u>Managed</u> web updates since January 2015

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

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

Consistency

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

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

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

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

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

Style Sheets

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

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

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

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

Incorporating Visuals

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

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

Visuals that you might consider include:

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

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

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

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

Activities

1. Pick up a copy of your local school newspaper. What design elements do you see being used consistently throughout?

2. Find a website that you feel has effective design. In groups or as a class discuss what features of the website relate to contrast, proximity, alignment, and consistency. Do you see any room for improvement?
3. Find a brochure or flyer that you feel was poorly designed and bring it to class. What changes would you make to improve the document?
4. As a class discuss what design features you feel would work best in workplace communication. Create a style sheet for the class to follow on the next assignment. Be sure to include what style manual you will use for reference and any deviations from the manual you will make.
5. Below you can see three lists of sample headings, each with a weakness. Revise each list to resolve the problem.

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

Media Attributions

- Document without design
- Experience
- White space



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Chapter 3: Ethical and Legal Obligations

Bay College

Learning Objectives

Ethics and Technical Communication ^[7]

As you put together professional documents and begin working in the “real” world, you must understand what could easily lead to your downfall in your professional workplace. The Paul Anderson text claims that at work in a professional setting, there are at least three major “sources of guidance”:

1. The code of ethics already developed by your field’s professionals.
2. The ethical code set in place by your company.
3. Your own personal ethics.

Some companies have decided to have employees keep their personal ethics at home. In reality, companies that try to keep personal ethics at home find that employees are occasionally asked to perform actions that they do not condone at home. In professional settings we would like to assume that companies would not act unethically, so why should we even pay attention?

The truth is, companies do act unethically whether it is disposing of toxic waste incorrectly or price gouging to name a few. The same goes for writing professional documents. You should keep them clean and standardized to save yourself from damaging a possible job opportunity and the name you represent.

Stakeholders

When writing any professional document, it is important to identify the potential stakeholders. A stakeholder is anyone who will be affected by what you are intending on writing. How you choose to word your document or even the choice to write the document becomes an ethical matter to stakeholders. It is crucial to consider your main objective(s) before writing. If you are writing a document that would be used to harm other living things (like writing a manual for a handgun) you have to weigh the implications to all stakeholders impacted. According to the Paul Anderson text, there are three types of stakeholders: direct, indirect, and remote. ^[8]

Direct

The direct stakeholders are those initially impacted by what you write. For instance, if you are writing about opening a new waste disposal area, the stakeholders clearly include the company you are writing to. However, disposal companies that might use this waste area in the future are also considered direct stakeholders. Their future business will be impacted based on whether your proposal is accepted or declined.

Indirect

The indirect stakeholders are those that are not impacted until a later time. Using the previous example of the waste disposal, citizens in the area would be indirect stakeholders. The stakeholders don’t necessarily need to be people. The nearby eco-systems would be indirect stakeholders to this same proposal. If toxic waste is dumped there, it would harm the animals, rivers and plant life nearby.

Remote

Finally, the remote stakeholders are not affected until far into the future. One example following our hypothetical waste disposal area, is future generations. While it may seem far-fetched, historically, there have been instances where toxic or poisonous things have been disposed of incorrectly and the run-off that went into lakes and streams caused birth defects. While this is remote, it must be considered when writing a document.

Key Takeaways

Ethical Writing

Once on the job, you will be assigned to create many documents throughout your professional career. Some may be simple and straightforward, some may be difficult and involve questionable objectives. Overall, there are a few basic points to adhere to

whenever you are writing a professional document: ^[9]

- Don't mislead.
- Don't manipulate.
- Don't stereotype.

Don't Mislead

This has more than one meaning to the professional writer. The main point is clear. When writing persuasively, do not write something that can cause the reader to believe something that isn't true. This can be done by lying, misrepresenting facts, or just "twisting" numbers to favor your opinion and objectives. This is clearly different from the resume ethics. Once you are on the job, you cannot leave out numbers that show you're behind or over-budget on a project, no matter how well it may work once it is completed. Facts are facts and they must be represented in that way. Be cautious when using figures, charts and tables, making sure they are not misleading. While this may seem easy to read about, when the pressure is on and there are deadlines to meet, taking shortcuts and stretching the truth are very common.

The other, less frequently used component is **plagiarizing**. While it may seem like this is something students learn to avoid after they graduate, it remains an important guideline for all professionals. Plagiarizing is misrepresenting the source or facts, most commonly when you claim the ideas you are writing about are yours. When you are researching professional documents, make sure you are using material with permission. If you are writing about what you've researched, make sure you are citing the sources of your information and giving credit to all the necessary researchers.

This rule also extends beyond writing to what is referred to as intellectual property. Intellectual property includes the following:

Patents and trademarks are company names (WalMart), logos (the Target bullseye), processes or slogans (I'm lovin' it) that belong to a person or company. None of these things can be used without proper recognition of or approval from the appropriate company or individual involved.

A company uses a TM to show something is trademarked or an [®] for something registered with the U.S Patent and Trademark Office. An example would be Nike and their famous swoosh symbol.

This law extends beyond the major companies. Any written document in your own company is copyrighted by law once produced. That means if you are borrowing a good idea from a friend at another company, you must cite them as a source. Also, although not required by law, it is a good idea to cite sources from inside your own company as well. You wouldn't want someone else taking credit for your ideas. Why should you treat others any differently?

The legal consequences are most notable when one considers writing in the professional world. While plagiarizing may give you a failing grade in a class, plagiarizing in the workplace can not only get you fired, but could result in a costly lawsuit or possibly even jail time. It is not only ethical to follow these rules, it is an enforced law. Make sure you properly document all sources so as not to mislead a reader.

Spend a few minutes viewing the following website for clarification on copyright, trademark, and registered trademark: [Differences Between a Copyright, Trademark, & Registration](#).

Copyright law includes items whose distribution is protected by law (books, movies, or software). The copyright symbol is shown with a ©. Copyright is different from plagiarism in that it is a legal issue. Only the copyright holder, the person/organization who owns the protected item, can copy it.

Some considerations made by the court when determining if a copyright law has been violated include:

- The character, purpose of use, and amount of information being used. Was it a phrase, sentence, chapter, or an entire piece of work? Was the information simply copied and pasted as a whole or changed? Was it taken from something published or unpublished? What was it used for?
- If the person using another's material did so to profit from it. Only the copyright holder should profit from the material he/she owns. For example, this is why a faculty member cannot use his or her personal cd for a movie screening on campus and charge students to attend the viewing.
- If using someone else's property affected the market for the copyrighted work. For example, if I take an item that would cost money to buy and copy it for other people, I am affecting the market for that product since the people I give it to will now not have to purchase it themselves. Therefore, the original owner of the material is denied a profit due to my actions.

When dealing with copyright questions, consider the following tips. First, find out if the item can be used. Sometimes, the copyright holder allows it if credit is given. Second, don't use large amounts of another person's information. Third, if possible, ask permission to use another person's work. In addition, and most importantly, cite sources accurately so as to give credit to the another person's ideas if you are able to use them.

Don't Manipulate

If you are holding a professional job, it is understood that you have a decent ability to write persuasively, even if your first persuasive document was your resume. Do not use your ability to persuade people to do what is not in their best interest. While this may not always seem easy, a good writer with a bad motive can twist words to make something sound like it is beneficial to all parties. The audience may find out too late that what you wrote only benefited you and actual ended up hurting them. This goes back to the stakeholders. Make sure they are not only considered and cared for when writing a persuasive document. It is easy to get caught up in the facts and forget all the people involved. Their feelings and livelihood must be considered with every appropriate document you create.

Don't Stereotype

Most stereotyping takes place subconsciously now since workplaces are careful to not openly discriminate. It is something we may not even be aware we are doing, so it is always a good idea to have a peer or coworker proofread your documents to make sure you have not included anything that may point to discriminatory assumptions.

Addressing Unethical Practices

Many times in the professional setting, workers find it difficult to deal with unethical practices in their company. First, begin by bringing the unethical practice to the surface, which is usually the hardest part. Paul Anderson's text reviews **three** ways that you can bring your company's practices to the surface. It is easiest to first start asking questions. Asking questions may seem too simple but it is an effective way of bringing attention to your company's problems. Ask questions about who their decisions are affecting and why they are making those decisions. This will not put you on the spot for being the bad guy, but it will allow you to voice your opinion.

The second idea Anderson describes as being helpful in revealing unethical practices is to use facts or reason, instead of accusation. Before you raise questions about your company's unethical practices, make sure you have cold hard facts instead of accusations. Many times accusations are made about situations where people truly do not know the reason those decisions were being made. If you base your thoughts around true facts, your company will assume you looked into the situation and will take your thoughts more seriously.

The third helpful way to bring your company's unethical practices to the surface is to remain open to others ideas. What this allows you to do is base a solution around many different sides instead of just your own. Since people usually have different ethical values, your own stance may not coincide with everyone else's'. Make sure you identify possible values of others when considering possible solutions.

Employing Ethical Techniques

In professional writing, ethical dimensions begin to surface especially in persuasive writing. When you are trying to persuade other people to make a certain decision or to take action, stay clear of manipulation and misconceptions. At times, you may be misleading someone unintentionally. In persuasive writing, you must respect the reader's values and viewpoints. Do not use false or skewed facts or argue from such premises because you may deceive the reader(s) and cause them to make an unlawful decision.

Avoiding manipulation when writing persuasively is also key. Sometimes you may be aware of the readers point. If so, you must make sure not to use this personal information against them in your writing. It is unethical to persuade readers to make a decision that benefits yourself and not them. Most times, people try to manipulate others to receive some type of reward or gain.

To avoid using misleading or manipulating words and phrases, it is important to be open to alternative viewpoints. In preparing any type of persuasive writing, you will come across conflicting viewpoints, so being aware of other views should not be hard. Keep your readers' ideas and goals in mind and consider what lies behind their concerns. To help solve these problems it may also be good to make statements based on human values. Discussing several opinions and ideas on the subject will make you more persuasive, because most viewpoints will be included to prevent you from appearing biased.

Legal Issues and Communication

This [section](#) presents information about legal aspects of communication which will help ensure that your writing is free of legal concerns. Click on the blue link that starts this section..

Appreciating Different Cultures

This [section](#) discusses the importance of considering diversity when writing because our world is multicultural, and your writing needs to reflect our world in that regard. Click on the blue link that starts this section.

Key Takeaways

Ethics Decision Checklist

- What is the nature of the ethical dilemma?
- What are the specific aspects of this dilemma that make you uncomfortable?
- What are your competing obligations in this dilemma?
- What advice does a trusted supervisor or mentor offer?
- Does your company's code of conduct address this issue?
- Does your professional association's code of conduct address this issue?
- What are you unwilling to do? What are you willing to do?
- How will you explain or justify your decision?

Legal Issues and Communication ^[10]

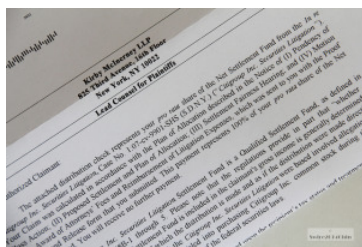


[11]

In business, image is everything. Public opinion of a company affects a consumer's views on that company's products. This, in turn, affects the company's public profit, and essentially its standing. When a company is involved in a lawsuit or a recall, the company has to consider the consequences that these issues will have on their business and needs to consider the costs of repairing the company's reputation. These are among the reasons certain documents are carefully reviewed before being sent to their intended readers. To write ethically, you must also identify another group of people: the individuals who will gain or lose because of your message. Collectively, these people are called stakeholders because they have a stake in what you are writing. Only by learning who these stakeholders are can you assure that you are treating them in accordance with your own ethical values. When crafting your communication think about who will be affected by what you say and how you say it. You have to be sensitive to the following language in a professional document:

- Race and gender roles
- Political correctness
- Generalizations
- Cultural awareness
- Religious symbols

[12]



Under the law, most documents written by employees represent the position and commitments of the organization itself. There are always legal issues to consider when writing a professional document and they reflect in writing style. Professional documents can serve as evidence in disputes over contracts and in product liability lawsuits. A lawsuit is a civil action brought in court. Today, the average company is involved in 400 lawsuits at any given time. While most companies win their lawsuits, being caught in a lawsuit has many consequences. Lawsuits cost companies time and money. The money spent on lawyers and the time spent in court takes away resources a company could use for improving business and products. Lawsuits also have ramifications for a company's reputation. Recalls can be another legal problem for companies. A recall is when a product is removed from the market or a correction is made to the product because it is either defective or potentially harmful. In most cases, a recall results from an unintentional mistake by a company rather than from an intentional disregard for the law. Sometimes a company discovers a problem and recalls a product on its own. Other times a company recalls the product after concerns are made.

There are a number of reasons why a company may face a lawsuit or a recall. One of the main reasons a company gets involved in a lawsuit is because the directions to the company's product were not clear to the consumer. For this reason, the general guideline is that instructions should be understandable, clear and concise at the fourth to sixth grade reading level. Also, when in a lawsuit, a company has to remember that all documents may be subpoenaed. This means that any document from memos and emails to proposals and studies can be subject to revision by a court of law. Another reason a company gets into a lawsuit may be over a recall. An aspect of recalls are those dealing with safety concerns. Many products are recalled for potential safety concerns, even if no one was actually hurt. To avoid safety recalls, companies need to make sure they consider every possible danger involved with a product. Some dangers may seem to be common knowledge, but companies should be aware of those and label the product accordingly, regardless of assumptions about common knowledge.

Communication Constraints

Constraints are limits for documents set by the company or industry. As you gather the information that will form the basis for the way you craft your communication, you should also learn about any expectations, regulations, or other factors that may constrain what you can say and how you can say it. In the working world, expectations and regulations can affect any aspect of a communication. Aspects that affect communication are as follows:^[13]

- Tone of voice
- Use of abbreviations
- Tables
- Margins
- Length of document (as a maximum)



It is important to find out about these constraints and take them into account as you create your communication. Some of these constraints come directly from the employer. Your employer and your readers probably have expectations about the way you write a professional document. There are often, unspoken expectations about how the required elements will be prepared. You are cultivating a company's desire for a particular corporate image, to protect its legal interests, and to preserve its competitive edge. A toy company like LEGO, would not want to be associated with a technical document that includes slang or words that could

damage their reputation. They are legally protecting their business. Since all documents can be used against individuals and companies in court, all written documents with the company name should include only professional content that properly represents the company.

Other times, constraints are set by government regulations that determine how certain reports need to be written. Regulations are laws made by the government that affect what is in a document or how a document is written. Writing constraints can originate from outside the company. For example, from government regulations that specify how patent applications, environmental impact report, and many other types of documents are to be prepared. Similarly, scientific, technical, or other professional journals have strict rules about many aspects of the articles they publish. These regulations act as standards for crafting your communication effectively.

Style Constraints

Constraints may be set by style issues as well. There should be no clichés and idioms in documents because they may pose a problem with translating documents from one language to another. A cliché is a worn-out or overused expression that tends to sound trite and often doesn't express what you truly mean to say. Examples include: the bottom line is, head over heels, or take it or leave it. Idioms are words or expressions that are specialized vocabulary used by a group of people also known as jargon. Look at the phrases that you use when you write and see if they make sense when translated literally. If they don't, replace them with language that is clear and direct, and will not be misunderstood. Don't use "compound" sentences (and, or, nor, but, however, yet). Opinions and jokes should also be avoided in business documents. Communicate, argue or persuade your readers through facts and data instead of opinions.

Many companies also like to form a "custom" way of writing. Companies like Microsoft want all their documents to be written in the same style and format. The only way to do this is to teach the writers the "correct" way to write in order to portray Microsoft. What many people may not know is that Microsoft does this to cover themselves in a legal trial. If every single document is written using the same format, they can make sure that the customers understand the entire document and do not run into trouble with inconsistencies.

How do you know if you are following the correct constraints? The easiest way to understand how to write in your specific field is to look at documents written by your company and other companies in the industry within the past few months. This will allow you to see their style and how they make their argument. Some companies even publish style guides for writing. By seeing your company's regulations, you can begin to draft your argument. Make sure to follow your company's guidebook (if they have one) to be sure that your style is correct with their recommendations.

Remember that in professional writing you are trying to persuade the reader using an ethical style. This means to avoiding content that will not stand up in court, especially since people file lawsuits for everything these days. Make sure that the documents you write for your company are persuasive while also preserving your company's competitive edge.

Legal Requirements: Protecting Consumers ^[14]

Documentation should prepare readers to safely use the product. US law stipulates that a manual must list any hazards that may occur "from the intended or unintended but reasonably foreseeable use of its products." You have a legal duty to warn consumers when:

1. The product supplied is dangerous.
2. The danger is or should be known by the manufacturer.
3. The danger is present when the product is used in the usual and expected manner.
4. The danger is not obvious or well known to the user.

Failure to "adequately" warn consumers opens your company up to lawsuits. What exactly makes a warning "adequate"? Good question. Adequacy is almost impossible to define. It's much easier to define what is not adequate. Here's a few common ways that manuals or instructions fall short:

- Failure to warn users about how to properly use a product.
- Failure to warn against risks from proper use of a product.
- Failure to warn against any reasonably foreseeable misuses of a product.

The key commonality is that everything listed could result in bodily harm or death.

Safety information must also be accessible to your readers. Therefore, warnings should stand out from the rest of the documents, possibly with [icons](#), colored fonts, or bolding. They should also be easy to understand. A confusing warning is just as bad as not warning users at all.



Many companies list warnings at the beginning of the manual or instructions to give them prominence. That's fine, but also list hazards where the reader might encounter them in your instructions.

Of course, it's tempting to frontload the warnings as a preemptive strike against lawsuits. Lots of companies do it. Every electronic product is dangerous if you stick your tongue in the socket along with the plug. Just be reasonable. We've seen warnings that border on the bizarre: “Do not eat your iPod Shuffle”; “Do not use your hairdryer while sleeping”; “Do not use this rotary drill as a home dentistry kit,” etc.

Before you brainstorm a list of [improbable-but-possible warnings](#), we've got a warning of our own: Too many warnings—especially ridiculous ones—make the whole safety section seem silly. Then, no one takes the warnings seriously—not even the real ones. Remember: You only have to caution users when a danger is “reasonably foreseeable.” Aim for the [Goldilocks principle](#): find the middle ground between not enough warnings and way too many.

There are often contract and liability laws put into place to protect consumers.

Contract Law is an agreement between two entities. It can be written or oral. There are usually two kinds: express warranty and implied warranty. An express warranty is a clearly written or oral statement that the product of what a product is capable of. An implied warranty can be reasonably inferred by the purchaser. How so? How the packaging is done and what is on the accompanying fliers or material can be part of this.

Liability Law helps companies and organizations act responsibly. Therefore, the company or organization is responsible for giving adequate instructions and warning users about the risks associated with the product. They can also be held liable if a consumer is injured or damages occur.

Liability and contract laws can vary by country. European regulations are decidedly strict, and Asian laws are starting to follow suit. If you plan on selling wares internationally, account for various regional requirements. Learn about [liability concerns](#) and relevant [international product liabilities](#) before you publish your manual. As always, consult a lawyer for specific information on how to construct warnings.

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[7] Ethics and Technical Communication. Provided by: WikiBooks. Located at: http://en.wikibooks.org/wiki/Professional_and_Technical_Writing/Ethics#Legal_Issues_and_Communication. Project: Professional and Technical Writing. License: [CC BY-SA: Attribution-ShareAlike](#), edited by [Amber Kinonen](#), edits included in italics

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[9] Image of Ethics Wall Sign. Authored by: Dan Mason. Located at: <https://flic.kr/p/eyP8qM>. License: [CC BY-NC-SA: Attribution-NonCommercial-ShareAlike](#)

[10] Legal Issues and Communication. Provided by: WikiBooks. Located at: http://en.wikibooks.org/wiki/Professional_and_Technical_Writing/Ethics/Legal_Issues. Project: Professional and Technical Writing. License: [CC BY-SA: Attribution-ShareAlike](#)

[11] Image of Buildings. Authored by: Miroslav Petrasko. Located at: <https://flic.kr/p/9f1ucR>. License: [CC BY-NC-ND: Attribution-NonCommercial-NoDerivatives](#)

[12] Image of Legal Paperwork. Authored by: Canadian Pacific. Located at: <https://flic.kr/p/ouJwP>. License: CC BY-NC: Attribution-NonCommercial

[13] Image of Person Signing Document. Authored by: Juli. Located at: <https://flic.kr/p/4H9qPz>. License: CC BY-NC-ND: Attribution-NonCommercial-NoDerivatives

[14] [Legal Requirements](#) CC-BY-NC Tech Writing Handbook, edited by [Amber Kinonen](#), edits included in italics



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Chapter 4: Writing Definitions, Descriptions, and Instructions

Bay College

Learning Objectives

Definitions, Descriptions, & Instructions ^[26]

An important part of technical and report writing is the use of definitions, descriptions, and instructions.

Definitions. We grow up reading these from the time we are in elementary school. They are one of the more common patterns of organization used. I see them in my son's middle school math textbooks to define various terms or his social studies book explaining that "caste" is a social ranking. My daughter is exposed to them in elementary school when her handouts come home defining what a number line is. Definitions can be simple short insertions in a sentence to clarify a term or they can be an entire document known as an extended definition. The good news is that you have already been exposed to them from the time you were very little.

Descriptions. These are similar to a definition but can be longer, more detailed, and have a visual representation to further explain a concept. More than likely, you have read these as well. Descriptions explain objects, mechanisms, and processes – and they do so in a way that whatever is being described is easily understood. If a description of the greenhouse effect was created for specialists in the field, it might be more complex. If this same idea was written for a general audience, the language would be "dumbed down" or simplified.

Instructions. I was redoing my daughter's room and putting up a cherry tree decal on her wall. I opened the package and pulled out a sheet with several "stickers" labeled with numbers; It was sort of like a tree puzzle I had to put together. I looked for directions to make it easier; however, none were to be found except for a small picture on the package of the pieces put together and the correlating numbers next to the pieces. The problem was that the picture was so tiny that the numbers didn't fit. In fact, I have a "spatial reasoning deficit" of some sort and could not follow the directions even after taping the picture to the wall next to where I wanted to place the cherry tree decal. Frustrated, I threw the directions out and made up the tree myself. Needless to say, I will be more careful when purchasing a similar product and will avoid doing so from the same company who made the cherry tree decal. I'm sure you have had similar experiences with following directions. Directions should use visuals to help the reader understand what is expected, be written clearly while using transitions to move the reader from one step to the next, and should include troubleshooting tips (ideas for how to fix common problems that may occur).

Technical Definitions ^[27]

A technical definition helps a reader understand items such as an object or process. It can be short and embedded in a document, or it can be its own document. The purpose of a definition is to provide clarity to the reader. The extent of the definition depends on your audience's background knowledge in regards to what you are writing about. For example, it could be a parenthetical definition that follows a potentially unknown term, a full sentence used after a term to further define it, or it may be an extended definition, or larger definition. In fact, a writer may use many methods within the definition to help the reader better understand it. Some methods that can be used include graphics, examples, comparisons, and contrasts.

Technical Descriptions ^[28]

The biggest hurdle you may face in writing a description is remembering what the term means as it is used in this context. We all use the word description loosely to refer to practically any discussion or explanation. But in this context, it means the detailed discussion of the physical aspects of a thing. That means discussing things like color, shape, size, weight, height, width, thickness, texture, density, contents, materials of construction, and so on.

For example, this sentence is not really description in our sense of the word: A computer diskette is a device used for storing electronic data.

It explains the function or purpose but provides little or no physical detail. It is a definition. However, this sentence is very definitely description: The common computer diskette is 3.5 inches by 3.5 inches and approximately 1/8 inch thick.

Be sure to check out the [example descriptions](#) available with this chapter.

Contexts for Description

As mentioned earlier, descriptions are common element in technical writing—just not quite in the same way that instructions are. Descriptions appear more often as a sentence or two here, a paragraph there, or a whole section elsewhere. Certain kinds of technical writing feature description:

- Accident reports requiring plenty of description.
- Product specifications—documents that describe design and feature of a new or changed product—have plenty of description.
- Instructions often require description to enable readers to visualize what they are doing and what they are working with.

Contents and Organization of Descriptions

The following is a review of the sections you'll commonly find in descriptions. As you read, check out the example descriptions.

Introduction. Plan the introduction to your description carefully. Make sure it does all of the following things (but not necessarily in this order) that apply to your particular description:

- Indicate the specific object about to be described.
- Indicate what the audience needs in terms of knowledge and background to understand the description.
- Provide a general description of the object.
- Include an overview of the contents of the description.

Background. If the thing you are describing is not likely to be familiar to most of your readers, consider adding some background before you plunge into the actual description. If you are about to describe an SGO/3 density gauge to non-specialists, you'd better first discuss what in the world the thing is, what it does and on what part of the planet it is used.

Visual. The easiest way for an individual to understand something is to see it. Visuals help with this. In addition, the parts of the object or process are often labeled so that the reader can further understand how each part works in conjunction with the entire item.

Discussion of the parts or characteristics. The main part of your description is the discussion of each part or characteristic. You must divide the thing you are describing into parts, or characteristics, or both. Parts are easy: for example, a wooden pencil has lead, a wooden barrel, an eraser, and a metal clip. Characteristics are describable aspects of a thing but are not parts: for example, the pencil has a certain weight, length, width, and so on. If you were a budding real-estate tycoon and had to describe a vacant lot for company files, you'd probably describe it by its characteristics: its location, square footage, terrain, vegetation, access to utilities, and so on. (Check out the description of the primitive stone scraper in the examples; part of it is arranged by characteristics and part by parts!) If this section follows a visual, it is often organized to match the visual. For example, it might list the parts in clockwise order or from top to bottom of how they are labeled on the visual. In addition, the descriptors labeled on the visual match what is listed in this section exactly. Consistency is key.

Once you've divided the thing you are describing into parts, characteristics, or both, your next job is to describe each one. For mechanical things, it works well to start by defining the part, by explaining its function. After that, you describe the part from general to specific, using any of the sources of description that are appropriate.

Notice that in description, you can mix other kinds of writing. You'll find yourself explaining functions, defining terms, discussing a bit of process as you describe. That's not a problem as long as the primary focus and the majority of the content is truly description.

Discussion of the related operation or process. At some point in a description, often at the end, it is useful to summarize the operation or process associated with the object you're describing. For example, if you've just described a mechanical pencil, you could briefly explain how it is used. If you've just described a snowflake, you could discuss the process by which it formed.

Sources of Description

When you write a description, you need to think about the kinds of descriptive detail you can provide. Sometimes, descriptions are rather weak in this area. Use the following list to plan your description or to review a description you have written. Think of the categories of descriptive detail you could provide, or use the following list to identify categories you have not used:

color	depth
height	amount
width	pattern, design
shape	ingredients
weight	age
materials	subparts
texture	length
width	finish
location	temperature
methods of attachment	moisture content
	smell

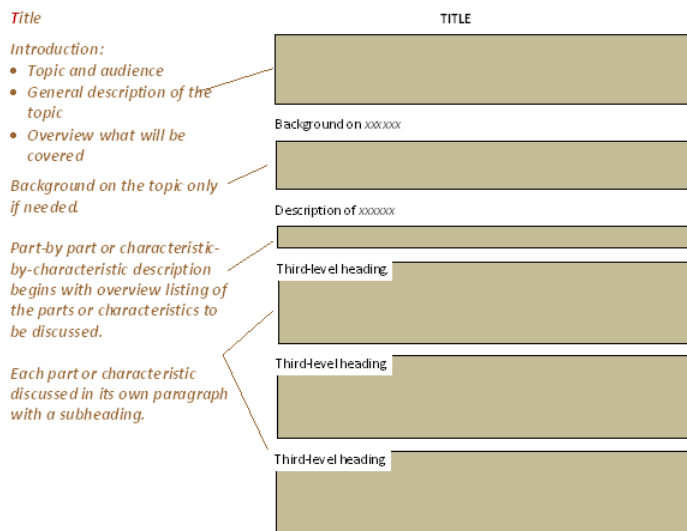


Figure 12. Schematic view of descriptions. Remember that this is just a typical or common model for the contents and organization—many others are possible.

Miscellaneous Concerns

In descriptions, you'll probably find yourself puzzling over how to handle numbers, abbreviations, and symbols:

Numbers. Remember that technical writing breaks some of those rules you worked so hard to learn in past writing classes. In the technical writing context, we are often vitally concerned about numbers and want them to stand out. This means that you should use numerals in running text when the number indicates an exact, measured, or measurable amount or when it represents a critical value. For example, in these sentences, it seems to matter that the numbers are exact:

The cup is 3 inches in diameter.

Use 4 tacks to fasten the poster to the wall.

However, this does not mean using numerals for indifferent values. For example, in this sentence, there is nothing heart-stopping about how many sections the report has:

The report contains four major sections.

See the section on [numbers vs. words](#) for further details.

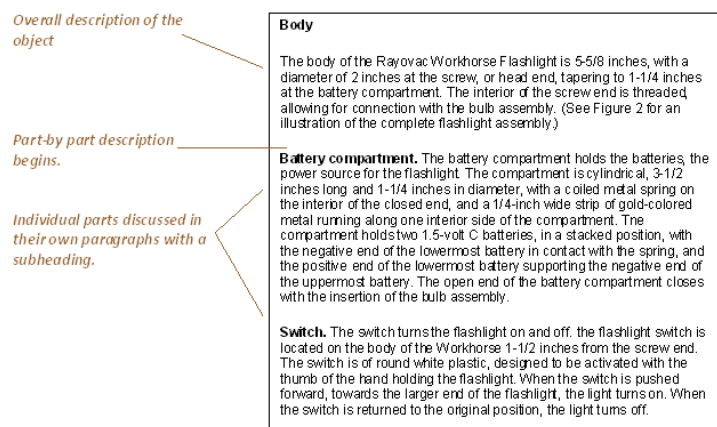


Figure 13 Description organization

Anatomy of a descriptive paragraph. Typically, it starts with some statement about the purpose or function of the part, with the descriptive detail following. Descriptive detail draws upon the “sources” of description—such things as color, shape, width, and height.

Abbreviations. In technical writing, we expect to see abbreviations. Use them in your description freely. Remember the rule on punctuating abbreviations—punctuate them only if they spell a word (for example, “in.”). Remember too that abbreviations do not go up against the number they are used with (for example, make that “8 mm tape” or “8-mm tape” but not “8mm tape”).

Symbols. The most common problem with symbols in instructions and descriptions has to do with inches and feet. If you’re writing instructions for a carpenter’s dream project where there are feet and inches all over the place, use the symbols ” (inches) and ‘ (feet). However, if you cite inch and foot measurements only a few times, use the word or abbreviation instead.

Graphics and Format in Descriptions

In most descriptions, you’ll need at least one illustration of the thing you are describing, with labels pointing to the parts. See the section on [graphics](#) for more on creating graphics, formatting them, and incorporating them into your descriptions.

Headings. In descriptions, you’ll want to use headings and subheadings to mark off the discussion of the individual parts or characteristics. Remember that, ideally, you want to describe each part in a separate paragraph or section—and flag that discussion with a heading.

If you have a background section, use a heading for it too. See the section on [headings](#) for the specific requirements.

Lists. Lists are not nearly so important in descriptions as they are in instructions. However, if you itemize parts or subparts or list specifications, these are good situations for lists. See the section on [lists](#) for the specific requirements.

Special notices. In descriptions, there is nothing like the important role for special notices as there is in instructions. After all, if it really is a description, readers should not be trying to follow any procedure, and therefore should not be running any risks of damaging equipment, wasting supplies, screwing up the procedure, or injuring themselves or others. However, you may find the note special notice to be useful to emphasize important points or exceptions. See the section on [special notices](#) for complete discussion of the proper use of these special notices as well as their format and placement within instructions.

Instructions

Go to the following website and read it in its entirety for information on writing instructions:

[Creating Rhetorically Effective Instruction Manuals](#) ^[29]

[Common Components of Instructions](#) ^[30]

Title

Keep it simple but clearly identify the task that will be performed. Use a “how to” or gerund (ing verb) when crafting it. Make sure the title adequately reflects the product and process users will be working on. It should be simple and clear.

Introduction

The goal of the introduction is to give general information about the process. What is it? Why should it be done? It is an overview of the process and why it is important. Often times, the writer lists the benefits of completing the process so that the reader feels good about the task he or she is about to complete.

Tools & Materials

List the items necessary to complete the task so that the reader can gather and organize them before starting the process. Consider using a bulleted list or some other formatting tool so that it is easy for the reader to skim through.

Visuals

Your reader will need visuals to refer to and act as a guide through the process. Remember to label the visuals as Figure 1, Figure 2, and so on, and then title each visual so the reader knows what he/she is looking at. Often times, the visual is referred to within the step-by-step part of the instructions.

Step-By-Step Instructions

Use a numbered list of step-by-step instructions for completing the process. Consider transitional words to keep the reader on track. Examples of transitions include: first, next, then, and finally. Also, write in clear and complete sentences throughout this section. In addition, refer to the visuals in this section. For example, a writer might include a phrase such as: “See Figure 3.” This will help the reader see the relationship between the steps and the visual.

Another reminder is to avoid the word “you” as you write; use the imperative mood. For example, instead of writing “You then push the blue button” write “Next, push the blue button.”

One last reminder is to explain to the reader why to do or not do something that may have negative consequences. This will help the reader have a positive experience completing the process.

Troubleshooting

A troubleshooting section helps the reader solve common problems. It is when someone tells the user to do something and adds, “If that doesn’t work, try this...” Sometimes, telling the reader what not to do is just as important as stating what to do. If you have several troubleshooting tips, organize this section so the reader can easily find the particular difficulty he or she needs solving at the moment. Therefore, make this section reader friendly and skimmable.

Conclusion

End the instructions with positive comments about the product and/or the process the user just completed. Sometimes there is a phone number for a Help Line if further assistance is needed. The benefits can also be restated but in different words but make sure not to use the exact words from the introduction. Readers don’t like to read the same exact words/phrases/sentences in the conclusion as they did in the introduction because it feels like the writer was too lazy to actually work on the document.

Warnings

Just because this is listed last in this section it doesn’t mean it is any less important than the other parts of the document or that it actually goes last in the document. In fact, the writer has to decide where in the document to put the warnings. They should be dispersed throughout. Also, remember legal and ethical obligations. It is the writer’s job to protect the reader from harm or damage. This being said, any set of instructions needs a careful balance of warnings strategically placed throughout the document. If the writer overuses them, there is a risk of scaring the user or making it so that the reader doesn’t want to carry out the process being described in the instructions. If the writer under-uses warnings, there is a risk of someone getting injured.

In addition, don’t create instructions where the user has already completed the process and injured him/herself before the warning comes. If someone is injured as the results of hidden or omitted warnings, it is the responsibility of the technical writer whose job it is to keep the reader safe.

In fact, there are standard precautionary statements that are color-coded and used for danger, warnings, cautions, and notes or notices. Click on the following link and carefully review them: [Precautionary Statements](#). Do NOT skip looking over this link! You will be expected to incorporate information from in it into the instructions you will create for the course.

References

[26] Definitions, Descriptions, & Instructions CC-BY [Amber Kinonen](#)

[27] Technical Definitions CC-BY [Amber Kinonen](#)

[28] Technical Description: What Does it Look Like? CC-BY [David McMurrey](#), edited by [Amber Kinonen](#), edits included in italics

[29] Creating Rhetorically Effective Instruction Manuals CC-BY-NC-ND Madelyn Tucker Pawlowski and Antonnet Johnson

[30] Common Components of Instructions CC-BY [Amber Kinonen](#)

[31] Audience Analysis in Form Reports CC-BY-NC-ND Angela Eward Mangione and Katherine McGee



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Chapter 5: Collaboration

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Learning Objectives

Teamwork and Collaboration

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

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

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

Analyzing Individual Skills and Group Dynamics

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

Before you get wrapped up in the details of the actual project, take some time to individually reflect on your strengths and weaknesses and then use your first time meeting as a group to share your individual skills and learn how each of your team members approach writing and group communication. For larger projects, especially, or when working with new people, taking the time to consider each member's particular skill set and communication style allows for a more efficient and successful collaborative experience. It is equally important to first establish ground rules for how the group will work and how the project will be completed. The steps that follow will also reduce frustration, and typically yield a stronger finished product; and in the workplace, this success also translates into time and money saved.

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

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

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

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

Structuring Collaboration: Three Approaches

This section will introduce three common structures for collaborative writing: face-to-face, skill-based division, and progressive tiered. When thinking about how your group completes a project, keep in mind the fact that there is more than one way to write effectively as a group. In fact, we recommend you try all three of the approaches outlined below throughout a group project keeping in mind the advantages and drawbacks for each. Each approach is best suited for certain aspects of team writing. We also advocate teams begin a project by first electing a project manager whose primary responsibility is to ensure the group is communicating and that the project is completed on time. The most effective project managers tend to be highly organized individuals who are able to keep the team communicated and consumed on completing quality work on time.

Face-to-Face

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

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

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

Skill-Based Division

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

Progressive Tiered

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

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

Common Collaborative Planning Documents

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

Team Charter

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

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

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

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

- Team and individual member goals
- Commitment of each team member
- Methods for communicating including meetings and other modes of discussion
- Conflict resolution
- How to handle missed deadlines and unacceptable work

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

Sample

Team Charter

Broad Team Goals:

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

Measurable Team Goals:

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

Personal Goals:

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

Individual Commitment:

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

Methods for Communicating:

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

Concerns:

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

Conflict Resolution:

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

Missed Deadlines:

- The member who missed the deadline will be contacted and will have twenty-four hours to submit an acceptable and completed assignment to the group.
- If they fail to do this they will be contacted again, the instructor will be informed, and their grade dropped 5 points.

Unacceptable Work:

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

Figure 14 Sample Team Charter

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

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

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

Sample Task Schedule

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

Sample

Task Schedule

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

Figure 15 Sample Task Schedule

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

Communication and Documentation

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

Agendas and Meeting Minutes

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

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

Sample

Sample Agenda

Hey Skylar and Joan!

Below is the agenda for our meeting tomorrow.

Skylar – I have received your information and put it in the brochure.

Joan–I still need your information by the meeting tomorrow so I can edit it in to the brochure.

The current draft of the brochure is posted on the google doc (link below) <https://drive.google.com/?hf845y43yf...sdykwiehfkgb//>

Agenda for March 5th, 2013 Meeting

We will be meeting on First Floor of Hale Library at 11:30am

1. Review the Current Brochure Draft by Checking for Edits/spelling/grammar/visual distraction
2. Create Template and draft the Memo
3. Assign printers for the Peer Review Day
4. Assign who will print the Final Drafts

Have a Great Day and See you tomorrow!

From,

Jerry Smith

Project Manager

Figure 16 Sample Agenda

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

Sample

Meeting Minutes

March 5th, 2013 Hale Library – 11:10am – 1pm

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

Brochure:

Edited and adjusted wording of each panel.

Brightened the color and rearranged the Logo.

Read the MS Chapters comments and made appropriate changes.

Memo:

Wrote the rough draft together

Highlighted trouble lines for peer editors to focus on.

Additional Actions/Decisions:

Resent the new draft of the brochure to the MS Chapter for review.

Members will print their own copies for peer review day.

For Friday:

Individually, read both rough drafts and choose 1 or more focal points for the peer edit on Friday.

Each member brings a print copy of memo and brochure.

Jerry – Bring MS societies response to new draft to class.

Figure 17 Sample Meeting Minutes

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

Activities

1. In preparation for your work in a collaborative writing team, record your answers to the individual questions listed in the Analyzing Individual Skills and Group Dynamics section at the beginning of this chapter. Then, be ready to share your responses with your new group members as you.
2. Your group has been assigned a large project that requires you to create a short survey and distribute it to a company's 545 employees, write-up the results of your survey findings in a memo to your boss, and present these findings in a short presentation to your department a month from now. Create a project schedule outlining the breakdown of tasks, assigning specific components to individuals. Be sure to also include due dates for these tasks. Assume you have 8 weeks starting today for your timeline.
3. Jayne, Inara, and Malcom are working together on a research project and all seem to be doing well with getting information. The day before team members are supposed to have their drafts complete for team review, Jayne sends an email to the rest of the team saying that he has been down with the flu and hasn't been able to work on his draft for the past week. He attached an outline for his draft with a few notes on what sources he is using. How should the team handle the situation



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Chapter 6: Proposals

Joe Moxley

Learning Objectives

Proposals

Written by Joe Moxley

Category: [Memos, Proposals & Reports](#)

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Learn how to improve your problem-solving and persuasive skills. Employ your writing and reasoning skills to make a difference in the world. View samples and write a proposal to conduct research, develop a Web site, solve a problem, or provide a service. Proposals are persuasive texts that articulate ways to solve a problem, conduct needed research, or provide a service.

Proposals may attempt to persuade readers to act or they may seek funding. Writers of proposals support claims with reasoning, library and Internet research, and original research, including questionnaires, interviews, and ethnographers. Ironically, even a proposal that seeks funding to conduct research needs to be firmly grounded in research. In other words, you often have to conduct research in order to craft a proposal, even if your ultimate goal is to secure funding for additional research.

Why Write Proposals?

In school, your instructors may ask you to write proposals to solve or improve a problem. For example, you could write a proposal to better meet the needs of students so 50% of them don't fail to complete their degrees. Or you could attempt to solve that age-old problem of parking on overcrowded campuses. Instructors across the disciplines may ask you to write research proposals, outlining a topic, describing its significance, and presenting a schedule for more thoroughly researching the topic. In business classes, your teachers may assign business plans or your teachers may seek proposals to improve the curriculum.

Proposals are arguments that seek particular outcomes from the readers of the proposals. Proposals can offer to trade services for money or goods, proposals can seek funding to conduct research, and proposals might present a call for action.

Diverse Rhetorical Situations

In general, proposals address three distinct purposes:

1. **Research Proposals:** Students and professionals often write research proposals, describing research they'd like to complete in college classes, professional settings, and laboratories. For example, a student might write a proposal to conduct a full-length research report, essentially outlining the topic, describing the significance of the topic, and explaining when and how the research would be conducted.
2. **Essay Proposals:** People write proposals as editorials or essays, hoping to influence people about various topics. The proposals go beyond arguing one side of a topic: They present a call for action. For example, a student might write an editorial in the student newspaper calling for a task force to explore ways to create healthier food choices on campus. An activist might write an article for a magazine, advocating particular health care reforms. A terrorism expert might argue for enacting certain policies in airports.
3. **Consulting Proposals:** Did you know that billions of dollars are awarded to successful proposals every year? People write proposals seeking funding for necessary services. For example, an environmental consulting business might sell its services to the EPA, offering to conduct a water contamination report, or an accounting firm might sell its services as an independent auditor.

In the U.S. much of the research conducted by university faculty and scientists is funded by government agencies and private foundations. Professional researchers often refer to the Community of Science, a funding source database, which identifies \$33 billion in funding opportunities. Another popular funding source database is IRIS.

As suggested by the table below, proposals are a remarkably diverse genre, coming in all shapes and sizes. Proposals can be page length or book length, covering hundreds of pages. Proposals can be presented in essay form and published in trade magazines. Alternatively, proposals can be submitted in an internal memo format or in an external report format. Some large organizations, such as the National Science Foundation, have online submission procedures.

Table 1 Proposal Types

Purposes	Audiences	Voices/Persona	Media
• Call for a specific action • Conduct research • Provide services	• Corporation • Foundation • Business • Newspaper	• Professional • Academic researcher • Activist • Persuasive	• Letters • Memos • External proposal • Editorial • Email • Web sites

Rhetorical Analysis of Online Readings

Activities

Consider the context, audience, purpose, and media invoked by the following readings. Also examine how ideas are developed in these texts. Are assertions grounded in personal experience, interviews with authorities, questionnaires, Internet and library research, or empirical research?

1. [MIT's Undergraduate Research Opportunities Program](#) (Sample Student Proposals)
2. [DECA](#), an association of marketing students, calls for a variety of proposals, which can be entered into a nationwide competition.
3. Students at Brown University rewrote the [Student Code of Conduct](#) because they weren't happy with the university's code.
4. [The Academy of Child and Adolescent Psychiatry](#) publishes Children and TV Violence to warn parents about the effects of violence on TV on their children, as suggested by the research of their members.
5. The American Psychological Association, the leading professional group of psychologists, has published [Childhood Exposure to Media Violence Predicts Young Adult Aggressive Behavior](#), According to a New 15-Year Study.
6. The Union of Concerned Scientists publishes [Powerful Solutions: 7 Ways to Switch America to Renewable Electricity](#), suggesting ways Americans can switch to renewable energy sources.
7. NSF, the [National Science Foundation](#), offers many sample proposals on its Web site, helping to guide future proposal writers.
8. NEH, [National Endowment for the Humanities](#), publishes successful proposals (in DOC and HTML and PDF formats) on its Web site; see sample proposals.
9. EPA, [Environmental Protection Agency](#), provides hundreds of proposals on its site; see sample proposals.
10. [Preventing AIDS: An Investment in the Future by Lawrence H. Summers](#). Representing the United States government as the Secretary of the Treasury, Lawrence H. Summers explains the importance of thinking globally when it comes to infectious

What Are Proposals?

Proposals typically outline a problem, detail solutions to the problem, and define the costs for solving the problem. Proposals provide information about the qualifications of the person or people suggesting the solution. When funds are sought to conduct the promised work, a detailed budget is provided. More formal proposals contain evaluation information—that is, a plan to evaluate the success of the proposal once it's implemented.

Key Features of Proposals

A proposal designed to affect readers' opinions about public policies differs from one seeking funding for research or to conduct research. Accordingly, the following analysis of key features is presented as a series of considerations as opposed to a comprehensive blueprint.

Focus

Proposal writers bring focus to their proposals by highlighting the urgency of the problem and by providing the evidence readers need to believe the proposed solution can work.

Development

It's true that some proposals are won on appeals to emotion. But ultimately, an argument needs to be based on reason. You need to conduct research to find the facts, opinions, and research that support your proposal.

Reading sample proposals can help you find and adopt an appropriate voice and persona. By reading samples, you can learn how others have prioritized particular criteria. Below are some additional suggestions for developing your proposal.

Define the Problem(s)

Obvious problems can be defined briefly, whereas more subtle problems may need considerable development. For example, Michael McManus details the problems with divorce for over five pages in *Why Is It in the Government's Interests to Save Marriages?* Thus, this part of your proposal may be as short as a sentence or many pages long. Occasionally writers will view the problem as so obvious to their audience that they won't even introduce it; see, for example, *What You Can Do About Global Warming* by the Union of Concerned Scientists.

When they read the introduction to your proposals, readers are likely to ask these two questions:

Who benefits from the proposal? Will the project have significant impact? Who is submitting the proposal? What is their interest in solving the problem? Is this person or organization qualified to solve the problem?

In order to answer these questions, provide specifics including statistics, quotes from authorities, results from past research, interviews, and questionnaires. Notice how the following excerpt stuns readers in its introduction with gruesome statistics. These statistics provide the background information that readers may need to understand the proposal:

Three hundred million people live on less than US\$1 per day. Life expectancy is 48 years and falling. More than one-third of all children are malnourished; more than 40 per cent have no access to education. Twenty-eight million people live with HIV/AIDS, and for over 100 million people, war is a part of daily life. And yet, in spite of these grim statistics, there are still grounds for optimism. The spread of democracy and the growing strength of African civil society, combined with the efforts by some African leaders to chart a new course, offer a real chance to tackle the root causes of poverty and conflict.

Define Method(s)

How will you gather information (secondary research or primary research)? In the humanities, writers do not explicitly mention their methods, whereas in the sciences and social sciences writers often explicitly mention their methods.

1. If you are proposing to conduct research, your readers will want information regarding how you propose to conduct the research. Will your research involve Internet and library research? Will you interview authorities?
2. If your proposal calls for laboratory research, your readers will want to see that you have access to the laboratory and tools needed to carry out the research.
3. If you are proposing a service, readers will want to ensure you can actually provide the service.



Sustainable Energy Projects – Proposal Development

Present Your Solution(s)

Successful proposals are not vague about proposed solutions. Instead, they tend to outline step-by-step activities and objectives, perhaps even associating particular activities and objectives with dollar figures—if money is sought to conduct the proposal. Critical readers are likely to view proposals skeptically, preferring inaction (which doesn't cost anything) to action (which may involve risk). As they review the solutions you propose, they may ask the following three questions:

1. Is the solution feasible?
2. How much time will it take to complete the proposal?
3. Will other factors resolve the problem over time? In other words, is the problem urgent?

Appeal to Character/Persona

People often imply or explicitly make “appeals to character.” In other words, they attempt to suggest they have credibility, that they are good people with the best interests of their readers in mind.

The persona you project as a writer plays a fundamental role in the overall success of your proposal. Your opening sentences generally establish the tone of your text and present to the reader a sense of your persona, both of which play a tremendous role in the overall persuasiveness of your argument. By evaluating how you define the problem, consider counterarguments, or marshal support for your claims, your readers will make inferences about your character.

When reviewing proposals, reviewers are particularly concerned about the credibility of the author. When an author is advocating a course of action, critical readers wonder about how the author(s) benefit from the proposal—or why they are presenting the proposal. Notice, for example, when the Brown American Civil Liberties Union rewrote the Code of Student Conduct, they were quick to agree with doubting readers that they also dislike “hate speech,” yet they thought stifling free speech on campus wasn't the best way to counteract hate speech:

We at the Brown American Civil Liberties Union (ACLU) are proposing the following changes to the Code of Student Conduct in an effort to ensure a consistent, unambiguous, and Constitutionally acceptable disciplinary code that does not consider protected speech a violation or an aggravating factor under any circumstances. We fully support the University's efforts to promote tolerance, understanding, and to prevent discrimination and prejudice. However, we strongly disagree with the assertion that the current Code prohibits only “behavior” and not Constitutionally protected speech. In addition, we believe that although hate speech may be offensive, it should not be censored. The solution to hate speech is more speech, not less. Brown must insure that all opinions, no matter how unpopular, can be freely stated and challenged within a free and open University. The current “behavior” guidelines, no matter how well intentioned, can potentially still be used to punish unpopular, yet Constitutionally protected speech. The potential for the current code to be wrongly interpreted by the University Disciplinary Council (UDC) is great, and has been used in the past to justify harsher penalties for speech-related violations than for actual physical confrontations. We seek to rectify this situation, and we feel our proposals should satisfy both the desire to protect the Brown community and to protect the rights of community members. We urge the timely and respectful consideration of our reform proposals listed below. [Brown University: Revising the Code of Student Conduct]

In less formal circumstances, writers will speak personally about the importance of the proposal. Consider, for example, this excerpt from one of the students' proposals featured at MIT's site on Undergraduate Research Proposals:

I am very enthusiastic to continue working with the multidisciplinary team of researchers involved with this project. As a student, I am excited to be able to supplement my education with out-of-class research. While learning about the organizations that are perceived to be on the “cutting edge,” those that have incorporated the best technologies and most innovative organizational approaches into their management structures, I will gain a better understanding of the overall business environments of both our society and of our world. Because the scope of this initiative is greater than what current consulting firms have to offer, this project is particularly attractive. Having an interest in the field of professional consulting, work on this project would allow me to explore in greater depth the subject material that a future career in consulting would involve. In addition, I will have the honor of working with a distinguished group of faculty and staff members that are under the direction of [faculty supervisor's name].

Because I am a student majoring in economics, minoring in psychology, and I possess a strong interest in management science, this multidisciplinary research initiative, which draws upon all three of these fields, really feels like a “nice fit” in terms of what it has to offer and by what I can give back. [Sample UROP Proposals]

In circumstances when a service is being proposed or when a research project is being proposed, they want to ensure the author has the resources, skills, and experience necessary to successfully provide the service.

Appeal to Emotion

Proposals are more firmly grounded in appeals to logic and character than appeals to emotion. Often, appeals to emotion would seem unethical or unprofessional. Critical readers tend to emphasize facts and qualifications when assessing proposals. Notice, for example, that:

The AMA doesn't put a face on all of the deaths caused by insufficient organs. [[AMA House Supports Studies on Organ Donation Incentives](#)]

The Union of Concerned Scientists doesn't emotionally describe the effects of global warming. [The Union of Concerned Scientists]

However, because of the power of emotional appeals, you may want to slip them into the introduction and conclusion of your proposal. Just be discreet and careful. Most modern, well-educated readers are quick to see through such manipulative attempts and they prefer the bulk of a proposal to be grounded in research and logic.

Additional emotional appeals include:

- Appeals to authority. (According to the EPA, global warming will raise sea levels.)
- Appeals to pity. (I should be allowed to take the test again because I had the flu the first time I took it.)
- Personal attacks on the opposition, which rhetoricians call *ad hominem* attacks. (I wouldn't vote for that man because he's a womanizer.)

Appeal to Logic

Successful proposals are firmly grounded in logic. You need to provide evidence if you hope to sway educated readers. Your description of the problem must be firmly grounded in research. You can add depth and persuasiveness to your proposal by citing authorities, interviewing experts, and researching past attempts to solve the problem. Trained as critical readers, your teachers and college-educated peers expect you to provide evidence—that is, logical reasoning, personal observations, expert testimony, facts, and statistics.

Consider Counterarguments

Typically, proposal writers are under severe word-length restrictions. In professional contexts, they may be competing with hundreds, perhaps thousands of writers who each have five pages to sell their solution. Accordingly, each word is precious so proposal writers do not want to give significant air time to articulating counterarguments or counter solutions.

Even so, at some point in your proposal, you may need to present counterarguments or consider the wisdom of alternative solutions. Essentially, whenever you think your readers may think your alternative solutions are more feasible, you need to account for their concerns. Elaborating on counterarguments is particularly useful when you have an unusual claim or a skeptical audience.

Consider, for example, Jonathan Trager's "Libertarian Solutions: How Small-government Solutions Can Successfully Stop the Terrorist Threat." Addressing the best ways to protect our airports in light of 9/11, Trager spends the bulk of his proposal critiquing other people's solutions. In particular he critiques these three recommendations:

1. Have government bureaucrats man x-ray machines in airports.
2. Regulate immigration more effectively.
3. Grant more power to law enforcement.

Using an inductive organization, it really isn't until the middle of his proposal that he cites his four solutions:

1. Stop disarming pilots.
2. Dismantle the drug war.
3. Return to a non-interventionist foreign policy.

Prohibit the American government from giving weapons—or money to buy weapons—to foreign nations.

Use Visuals

Readers love visual representations of proposals because they enable readers to see the proposal, engaging readers at a visual level. Consider the effects of the following creative uses of visuals: To augment their proposal on ways to alleviate parking problems at Harvard (see [Students Tackle Parking Problems](#)), the students provided video clips, illustrating how robotic garages can best solve Harvard's parking problems.

Chunk Your Contents

Consider “chunking” your proposal. For example, some proposals call for a 50-word abstract and a 500-word executive summary. Many of the proposals linked in this section provide brief and extended examples

Organization

Most proposals to conduct research or provide a service are organized as classical arguments: The author briefly presents the problem and then proposes the solutions. Occasionally, writers will employ a more inductive organization, particularly when the proposed solution may seem controversial.

Style

You can make your proposal more persuasive by using unambiguous, concrete language, appealing to the reader’s senses and relating the subject or concept to information that the reader already understands, moving from given to new information.

Learning Objectives

Business Proposal

Written by Joe Moxley

Category: [Memos, Proposals & Reports](#)

Published: 21 December 2012

Last Updated: 23 January 2018

Learning Objectives

1. Describe the basic elements of a business proposal.
2. Discuss the main goals of a business proposal.
3. Identify effective strategies to use in a business proposal.

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

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

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

Common Proposal Elements

Idea

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

underscoring long-term relationships, demonstrated ability to deliver, or the ability to anticipate the company's needs? Business proposals need to have an attractive idea or solution in order to be effective.

Traditional Categories

You can be creative in many aspects of the business proposal, but follow the traditional categories. Businesses expect to see information in a specific order, much like a résumé or even a letter. Each aspect of your proposal has its place and it is to your advantage to respect that tradition and use the categories effectively to highlight your product or service. Every category is an opportunity to sell, and should reinforce your credibility, your passion, and the reason why your solution is simply the best.

Table 2 Business Proposal Format

Cover Page	Title page with name, title, date, and specific reference to request for proposal if applicable.
Executive Summary	Like an abstract in a report, this is a one- or two-paragraph summary of the product or service and how it meets the requirements and exceeds expectations.
Background	Discuss the history of your product, service, and/or company and consider focusing on the relationship between you and the potential buyer and/or similar companies.
Proposal	The idea. Who, what, where, when, why, and how. Make it clear and concise. Don't waste words, and don't exaggerate. Use clear, well-supported reasoning to demonstrate your product or service.
Market Analysis	What currently exists in the marketplace, including competing products or services, and how does your solution compare?
Benefits	How will the potential buyer benefit from the product or service? Be clear, concise, specific, and provide a comprehensive list of immediate, short, and long-term benefits to the company.
Timeline	A clear presentation, often with visual aids, of the process, from start to finish, with specific, dated benchmarks noted.
Marketing Plan	Delivery is often the greatest challenge for Web-based services—how will people learn about you? If you are bidding on a gross lot of food service supplies, this may not apply to you, but if an audience is required for success, you will need a marketing plan.
Finance	What are the initial costs, when can revenue be anticipated, when will there be a return on investment (if applicable)? Again, the proposal may involve a one-time fixed cost, but if the product or service is to be delivered more than once, and extended financial plan noting costs across time is required.
Conclusion	Like a speech or essay, restate your main points clearly. Tie them together with a common theme and make your proposal memorable.

Ethos, Pathos, and Logos

Ethos refers to credibility, pathos to passion and enthusiasm, and logos to logic or reason. All three elements are integral parts of your business proposal that require your attention. Who are you and why should we do business with you? Your credibility may be unknown to the potential client and it is your job to reference previous clients, demonstrate order fulfillment, and clearly show that your product or service is offered by a credible organization. By association, if your organization is credible the product or service is often thought to be more credible.

In the same way, if you are not enthusiastic about the product or service, why should the potential client get excited? How does your solution stand out in the marketplace? Why should they consider you? Why should they continue reading? Passion and enthusiasm are not only communicated through “!” exclamation points. Your thorough understanding, and your demonstration of that understanding, communicates dedication and interest.

Each assertion requires substantiation, each point clear support. It is not enough to make baseless claims about your product or service—you have to show why the claims you make are true, relevant, and support your central assertion that your product or service is right for this client. Make sure you cite sources and indicate “according to” when you support your points. Be detailed and specific.

Professional

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

Effective, persuasive proposals are often brief, even limited to one page. “The one-page proposal has been one of the keys to my business success, and it can be invaluable to you too. Few decision-makers can ever afford to read more than one page when deciding if they are interested in a deal or not. This is even more true for people of a different culture or language,” said Adnan Khashoggi, a successful multimillionaire. [1] Clear and concise proposals serve the audience well and limit the range of information to prevent confusion.

Two Types of Business Proposals

Solicited

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

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

Unsolicited

Unsolicited proposals are the “cold calls” of business writing. They require a thorough understanding of the market, product and/or service, and their presentation is typically general rather than customer-specific. They can, however, be tailored to specific businesses with time and effort, and the demonstrated knowledge of specific needs or requirement can transform an otherwise generic, brochure-like proposal into an effective sales message. Getting your tailored message to your target audience, however, is often a significant challenge if it has not been directly or indirectly solicited. Unsolicited proposals are often regarded as marketing materials, intended more to stimulate interest for a follow-up contact than make direct sales. Sue Baugh and Robert Hamper encourage you to resist the temptation to “shoot at every target and hope you hit at least one.” [2] A targeted proposal is your most effective approach, but recognize the importance of gaining company, service, or brand awareness as well as its limitations.

Sample

Sample Business Proposal

The Writing Help Tools Center is a commercial enterprise, and offers a clear (and free) example of a business proposal here:

<https://www.writinghelptools.com/proposal-sample.html>

Exercises

1. Click on this link to see a sample request for proposal from the American Institute of Public Accounts.

<https://www.aicpa.org/interestareas/businessindustryandgovernment/resources/notforprofitresourcecenter/downloadabledocuments/16-samplerquest.dot>

2. Prepare a business proposal in no more than two pages. Follow the guidelines provided in the sample letter for CPA services on the American Institute of Public Accountants Web site. Do not include actual contact information. Just as the example has employees named after colors, your (imaginary) company should have contact information that does not directly link to real businesses or you as an individual. Do not respond to point 12.
3. Search for an RFP (request for proposal) or similar call to bid, and post it to your class. Compare the results with your classmates, focusing on what is required to apply or bid.
4. Identify a product or service you would like to produce or offer. List three companies that you would like to sell your product or service to and learn more about them. Post your findings, making the link between your product or service and company needs.

References

- [1] Riley, P. G. (2002). The one-page proposal: How to get your business pitch onto one persuasive page (p. 2). New York, NY: HarperCollins.
- [2] Baugh, L. S., & Hamper, R. J. (1995). Handbook for writing proposals (p. 3). New York, NY: McGraw-Hill.

Video: Business Proposals

<https://youtube.com/watch?v=aBAvSump...%3Dtransparent>

Saylor.org BUS210: "Business Proposals"

Saylor.org BUS210: Business Proposals. **Authored by:** The Saylor Academy. **Located at:** <http://www.youtube.com/watch?v=aBAvSumpgx8>. **License:** All Rights Reserved. **License Terms:** Standard YouTube license

Learning Objectives

Making An Argument

Learning Objectives

By the end of this section, you will be able to:

- Demonstrate how to form a clear argument with appropriate support to persuade your audience.
- Recognize and understand inherent weaknesses in fallacies.

According to the famous satirist Jonathan Swift, "Argument is the worst sort of conversation." You may be inclined to agree. When people argue, they are engaged in conflict and it's usually not pretty. It sometimes appears that way because people resort to fallacious arguments or false statements, or they simply do not treat each other with respect. They get defensive, try to prove their own points, and fail to listen to each other.

But this should not be what happens in written argument. Instead, when you make an argument in your writing, you will want to present your position with logical points, supporting each point with appropriate sources. You will want to give your audience every reason to perceive you as ethical and trustworthy. 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.

In this section we will briefly discuss the classic form of an argument, a more modern interpretation, and finally seven basic arguments you may choose to use. Imagine that these are tools in your toolbox and that you want to know how each is effectively used. Know that the people who try to persuade you—from telemarketers to politicians—usually have these tools at hand.

Let's start with a classical rhetorical strategy. It asks the rhetorician, speaker, or author to frame arguments in the following steps:

Table 3 Classical Rhetorical Strategy

1. Exordium	Prepares the audience to consider your argument
2. Narration	Provides the audience with the necessary background or context for your argument
3. Proposition	Introduces your claim being argued in the document
4. Confirmation	Offers the audience evidence to support your argument
5. Refutation	Introduces to the audience and then discounts or refutes the counterarguments or objections
6. Peroration	Your conclusion of your argument

This is a standard pattern in rhetoric and you will probably see it in both speech and English courses. The pattern is useful to guide you in preparing your document and can serve as a valuable checklist to insure you are prepared. While this formal pattern has distinct advantages, you may not see it used exactly as indicated here on a daily basis. What may be more familiar to you is Stephen Toulmin’s rhetorical strategy (1958), which focuses on three main elements (see Table 11.8 “Toulmin’s Three-Part Rhetorical Strategy”).

Table 4 Toulmin’s Three-Part Rhetorical Strategy

Element	Description	Example
1. Claim	Your statement of belief or truth	It is important to spay or neuter your pet.
2. Data	Your supporting reasons for the claim	Millions of unwanted pets are euthanized every year.
3. 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.

Toulmin’s rhetorical strategy is useful in that it makes the claim explicit, clearly illustrates the relationship between the claim and the data, and allows the reader to follow the writer’s reasoning. You may have a good idea or point, but your audience will want to know how you arrived at that claim or viewpoint. The warrant addresses the inherent and often unsaid question, “Why is this data so important to your topic?” In so doing, it helps you to illustrate relationships between information for your audience.

Effective Argumentation Strategies: GASCAP/T

Here is a useful way of organizing and remembering seven key argumentative strategies:

1. Argument by **G**eneralization
2. Argument by **A**nalogy
3. Argument by **S**ign
4. Argument by **C**onsequence
5. Argument by **A**uthority
6. Argument by **P**rinciple
7. Argument by **T**estimony

Richard Fulkerson notes that a single strategy is sufficient to make an argument some of the time, but it is often better to combine several strategies to make an effective argument (In Emmel, Resch, & Tenney, 1996). He organized the argumentative strategies in this way to compare the differences, highlight the similarities, and allow for their discussion. This model, often called by its acronym GASCAP, is a useful strategy to summarize six key arguments and is easy to remember. Here we have adapted it, adding one argument that is often used in today’s speeches and presentations, the argument by testimony. Table 5 “GASCAP/T Strategies” presents each argument, provides a definition of the strategy and an example, and examines ways to evaluate each approach.

Table 5 GASCAP/T Strategies

Argument by		Claim	Example	Evaluation
G	Generalization	Whatever is true of a good example or sample will be true of everything like it or the population it came from.	If you can vote, drive, and die for your country, you should also be allowed to buy alcohol.	STAR System: For it to be reliable, we need a (S) sufficient number of (T) typical, (A) accurate, and (R) reliable examples.
A	Analogy	Two situations, things or ideas are alike in observable ways and will tend to be alike in many other ways	Alcohol is a drug. So is tobacco. They alter perceptions, have an impact physiological and psychological systems, and are federally regulated substances.	Watch for adverbs that end in “ly,” as they qualify, or lessen the relationship between the examples. Words like “probably,” “maybe,” “could,” “may,” or “usually” all weaken the relationship.
S	Sign	Statistics, facts, or cases indicate meaning, much like a stop sign means “stop.”	Motor vehicle accidents involving alcohol occur at significant rates among adults of all ages in the United States.	Evaluate the relationship between the sign and look for correlation, where the presenter says what the facts “mean.” Does the sign say that? Does it say more? What is not said? Is it relevant?
C	Cause	If two conditions always appear together, they are causally related.	The U.S. insurance industry has been significantly involved in state and national legislation requiring proof of insurance, changes in graduated driver’s licenses, and the national change in the drinking age from age 18 to age 21.	Watch out for “after the fact, therefore because of the fact” (<i>post hoc, ergo propter hoc</i>) thinking. There might not be a clear connection, and it might not be the whole picture. Mothers Against Drunk Driving might have also been involved with each example of legislation.
A	Authority	What a credible source indicates is probably true.	According to the National Transportation Safety Board, older drivers are increasingly involved in motor vehicle accidents.	Is the source legitimate and is their information trustworthy? Institutes, boards, and people often have agendas and distinct points of view.

	Argument by	Claim	Example	Evaluation
P	Principle	An accepted or proper truth	The change in the drinking age was never put to a vote. It’s not about alcohol, it’s about our freedom of speech in a democratic society.	Is the principle being invoked generally accepted? Is the claim, data or warrant actually related to the principle stated? Are there common exceptions to the principle? What are the practical consequences of following the principle in this case?
T	Testimony	Personal experience	I’ve lost friends from age 18 to 67 to alcohol. It impacts all ages, and its effects are cumulative. Let me tell you about two friends in particular.	Is the testimony authentic? Is it relevant? Is it representative of other’s experiences? Use the STAR system to help evaluate the use of testimony.

Evidence

Now that we've clearly outlined several argument strategies, how do you support your position with evidence or warrants? If your premise or the background from which you start is valid, and your claim is clear and clearly related, the audience will naturally turn their attention to "prove it." This is where the relevance of evidence becomes particularly important. Here are three guidelines to consider in order to insure your evidence passes the "so what?" test of relevance in relation to your claim. Make sure your evidence has the following traits:

1. *Supportive*. Examples are clearly representative, statistics are accurate, testimony is authoritative, and information is reliable.
2. *Relevant*. Examples clearly relate to the claim or topic, and you are not comparing "apples to oranges."
3. *Effective*. Examples are clearly the best available to support the claim, quality is preferred to quantity, there are only a few well-chosen statistics, facts, or data.

Appealing to Emotions

While we've highlighted several points to consider when selecting information to support your claim, know that Aristotle strongly preferred an argument based in logic over emotion. Can the same be said for your audience, and to what degree is emotion and your appeal to it in your audience a part of modern life?

Emotions are a psychological and physical reaction, such as fear or anger, to stimuli that we experience as a feeling. Our feelings or emotions directly impact our own point of view and readiness to communicate, but also influence how, why, and when we say things. Emotions influence not only how you say or what you say, but also how you hear or 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.

Aristotle thought the best and most preferable way to persuade an audience was through the use of logic, free of emotion. He also recognized that people are often motivated, even manipulated, by the exploitation of their emotions. In a business context, we still engage in this debate, demanding to know the facts separate from personal opinion or agenda, but see the use of emotional appeal to sell products.

Marketing experts are famous for creating a need or associating an emotion with a brand or label in order to sell it. You will speak the language of your audience in your document, and may choose to appeal to emotion, but you need to consider how the strategy works, as it may be considered a tool that has two edges.

If we think of the appeal to emotion as a knife, we can see it has two edges. One edge can cut your audience, and the other can cut you. If you advance an appeal to emotion in your document on spaying and neutering pets, and discuss the millions of unwanted pets that are killed each year, you may elicit an emotional response. If you use this approach repeatedly, your audience may grow weary of this approach, and it will lose its effectiveness. If you change your topic to the use of animals in research, the same strategy may apply, but repeated attempts to elicit an emotional response may backfire (i.e., in essence “cutting” you) and produce a negative response called “emotional resistance.”

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. As Aristotle outlined, ethos (credibility), logos (logic), and pathos (passion, enthusiasm, and emotional response) constitute the building blocks of any document. It’s up to you to create a balanced document, where you may appeal to emotion, but choose to use it judiciously.

On a related point, the use of an emotional appeal may also impair your ability to write persuasively or effectively. For example, if you choose to present an article about suicide to persuade people against committing it and you start showing a photo of your brother or sister that you lost to suicide, your emotional response may cloud your judgment and get in the way of your thinking. 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 topics, you need to assess your relationship to the message. Your documents should not be an exercise in therapy. Otherwise, you will sacrifice ethos and credibility, even your effectiveness, if you “lose it” because you are really not ready to discuss the issue.

Recognizing Fallacies

“Fallacy” is another way of saying false logic. Fallacies or rhetorical tricks deceive your audience with their style, drama, or pattern, but add little to your document in terms of substance. They are best avoided because they can actually detract from your effectiveness. There are several techniques or “tricks” that allow the writer to rely on style without offering substantive argument, to obscure the central message, or twist the facts to their own gain. Table 6 “Fallacies” examines the eight classical fallacies. Learn to recognize them so they can’t be used against you, and learn to avoid using them with your audience.

Table 6 Fallacies

Fallacy	Definition	Example
1. Red Herring	Any diversion intended to distract attention from the main issue, particularly by relating the issue to a common fear.	It's not just about the death penalty; it's about the victims and their rights. You wouldn't want to be a victim, but if you were, you'd want justice.
2. Straw Man	A weak argument set up to easily refute and distract attention from stronger arguments.	Look at the idea that criminals who commit murder should be released after a few years of rehabilitation. Think of how unsafe our streets would be then!
3. Begging the Question	Claiming the truth of the very matter in question, as if it were already an obvious conclusion.	We know that they will be released and unleashed on society to repeat their crimes again and again.
4. Circular Argument	The proposition is used to prove itself. Assumes the very thing it aims to prove. Related to begging the question.	Once a killer, always a killer.
5. Ad Populum	Appeals to a common belief of some people, often prejudicial, and states everyone holds this belief. Also called the bandwagon fallacy, as people "jump on the bandwagon" of a perceived popular view.	Most people would prefer to get rid of a few "bad apples" and keep our streets safe.
6. Ad Hominem or "Argument against the Man"	Argument against the man instead of his message. Stating that someone's argument is wrong solely because of something about the person rather than about the argument itself.	Our representative is a drunk and philanderer. How can we trust him on the issues of safety and family?
7. Non Sequitur or "It Does Not Follow"	The conclusion does not follow from the premises. They are not related.	Since the liberal 1960s, we've seen an increase in convicts who got let off death row.
8. Post Hoc Ergo Propter Hoc or "After This, Therefore because of This"	It is also called a coincidental correlation.	Violent death rates went down once they started publicizing executions.

Ethical Considerations in Persuasion

In his book *Ethics in Human Communication*, Richard Johannesen (1996) offers eleven points to consider when communicating. Although they are related to public speaking, they are also useful in business writing. You may note that many of his cautions are clearly related to the fallacies we've discussed. His main points reiterate many of the points across this chapter and should be kept in mind as you prepare, and present, your persuasive message.

Do not

- use false, fabricated, misrepresented, distorted, or irrelevant evidence to support arguments or claims;
- intentionally use unsupported, misleading, or illogical reasoning;
- represent yourself as informed or an "expert" on a subject when you are not;
- use irrelevant appeals to divert attention from the issue at hand;
- ask your audience to link your idea or proposal to emotion-laden values, motives, or goals to which it is actually not related;
- deceive your audience by concealing your real purpose, your self-interest, the group you represent, or your position as an advocate of a viewpoint;
- distort, hide, or misrepresent the number, scope, intensity, or undesirable features of consequences or effects;
- use emotional appeals that lack a supporting basis of evidence or reasoning;

- oversimplify complex, gradation-laden situations into simplistic, two-valued, either-or, polar views or choices;
- pretend certainty where tentativeness and degrees of probability would be more accurate;
- advocate something that you yourself do not believe in.

Aristotle said the mark of a good person, well spoken, was a clear command of the faculty of observing in any given case the available means of persuasion. He discussed the idea of perceiving the various points of view related to a topic and their thoughtful consideration. While it's important to be able to perceive the complexity of a case, you are not asked to be a lawyer and defend a client.

In your message to persuade, consider honesty and integrity as you assemble your arguments. Your audience will appreciate your thoughtful consideration of more than one view and your understanding of the complexity of the issue, thus building your ethos, or credibility, as you present your document. Be careful not to stretch the facts, or assemble them only to prove your point; instead, prove the argument on its own merits. Deception, coercion, intentional bias, manipulation and bribery should have no place in your message to persuade.

Exercises

1. Select a piece of persuasive writing such as a newspaper op-ed essay, a magazine article, or a blog post. Examine the argument, the main points, and how the writer supports them. Which strategies from the foregoing section does the writer use? Does the writer use any fallacies or violate any ethical principles? Discuss your results with your classmates.
2. Find one slogan or logo that you perceive as persuasive and share it with your classmates.
3. Find an example of a piece of writing that appears to want to be persuasive, but doesn't get the job done. Write a brief review and share it with classmates.
4. In what ways might the choice of how to organize a document involve ethics? Explain your response and discuss it with your class.

References

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Chapter 7: Formal Reports

Joe Moxley; Angela Eward Mangione; and Katherine McGee

Learning Objectives

Reports

Written by Joe Moxley

Category: [Memos, Proposals & Reports](#)

Published: 21 December 2012

Last Updated: 23 January 2018

Learning Objectives

1. Discuss the main parts of a report.
2. Understand the different types of reports.
3. Write a basic report.

What Is a Report?

Reports are documents designed to record and convey information to the reader. Reports are part of any business or organization; from credit reports to police reports, they serve to 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, or involve the rational analysis of information. Sometimes they simply “report the facts” with no analysis at all, but still need to communicate the information in a clear and concise format. Other reports summarize past events, present current data, and forecast future trends. While a report may have conclusions, propositions, or even a call to action, the demonstration of the 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. This chapter is designed to introduce you to the basics of report writing.

Types of Reports

Reports come in all sizes, but are typically longer than a page and somewhat shorter than a book. The type of report depends on its function. The function of the report is its essential purpose, often indicated in the thesis or purpose statement. The function will also influence the types of visual content or visual aids, representing words, numbers, and their relationships to the central purpose in graphic, representational ways that are easy for the reader to understand. The function may also contribute to parameters like report length (page or word count) or word choice and readability. “Focusing on the content of your longer business documents is not only natural but necessary because doing so helps ensure complete, correct information.” [1]

Reports vary by function, and they also vary by style and tradition. Within your organization, there may be employer-specific expectations that need to be addressed to meet audience expectations. This chapter discusses reports in general terms, focusing on common elements and points of distinction, but reference to similar documents where you work or additional examination of specific sample reports may serve you well as you prepare your own report.

Informational or Analytical Report?

There are two main categories for reports, regardless of their specific function or type. An informational report informs or instructs and presents details of events, activities, individuals, or conditions without analysis. An example of this type of “just the facts” report is a police accident report. The report will note the time, date, place, contributing factors like weather, and identification information for the drivers involved in an automobile accident. It does not establish fault or include judgmental statements. You should not see “Driver was falling down drunk” in a police accident report. Instead, you would see “Driver failed sobriety tests and breathalyzer test and was transported to the station for a blood sample.” The police officer is not a trained medical doctor and is therefore not licensed to make definitive diagnoses, but can collect and present relevant information that may contribute to that diagnosis.

The second type of report is called an analytical report. An analytical report presents information with a comprehensive analysis to solve problems, demonstrate relationships, or make recommendations. An example of this report may be a field report by a Center for Disease Control (CDC) physician from the site of an outbreak of the H1N1 virus, noting symptoms, disease progression, steps taken to arrest the spread of the disease, and to make recommendations on the treatment and quarantine of subjects.

[Table 7 “Types of Reports and Their Functions”](#) includes common reports that, depending on the audience needs, may be informational or analytical.

Table 7 Types of Reports and Their Functions

Type	Function
1. Laboratory Report	Communicate the procedures and results of laboratory activities
2. Research Report	Study problems scientifically by developing hypotheses, collecting data, analyzing data, and indicating findings or conclusions
3. Field Study Report	Describe one-time events, such as trips, conferences, seminars, as well as reports from branch offices, industrial and manufacturing plants
4. Progress Report	Monitor and control production, sales, shipping, service, or related business process
5. Technical Report	Communication process and product from a technical perspective
6. Financial Report	Communication status and trends from a finance perspective
7. Case Study	Represent, analyze, and present lessons learned from a specific case or example
8. Needs Assessment Report	Assess the need for a service or product
9. Comparative Advantage Report	Discuss competing products or services with an analysis of relative advantages and disadvantages
10. Feasibility Study	Analyze problems and predict whether current solutions or alternatives will be practical, advisable, or produced the desired outcome(s)
11. Instruction Manuals	Communicate step-by-step instructions on the use of a product or service
12. Compliance Report	Document and indicate the extent to which a product or service is within established compliance parameters or standards
13. Cost-Benefit Analysis Report	Communicate costs and benefits of products or services.
14. Decision Report	Make recommendations to management and become tools to solve problems and make decisions
15. Benchmark Report	Establish criteria and evaluate alternatives by measuring against the establish benchmark criteria
16. Examination Report	Report or record data obtained from an examination of an item or conditions, including accidents and natural disasters
17. Physical Description report	Describe the physical characteristics of a machine, a device, or object
18. Literature Review	Present summaries of the information available on a given subject

How Are Reports Organized?

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

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 the key decision makers are who will read your report, who the experts or technicians will be, and how executives and workers may interpret your words and images. While there is no universal format for a report, there is a common order to the information. Each element supports the main purpose or function in its own way, playing an important role in the representation and transmission of information.

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

1. Report considers the audience's needs
2. Format follows function of report
3. Format reflects institutional norms and expectations
4. Information is accurate, complete, and documented
5. Information is easy to read
6. Terms are clearly defined
7. Figures, tables, and art support written content
8. Figures, tables, and art are clear and correctly labeled

9. Figures, tables, and art 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

Exercises

1. Find an annual report for a business you would like to learn more about. Review it with the previous reading in mind and provide examples. Share and compare with classmates.
2. Write a report on a trend in business that you've observed, and highlight at least the main finding. For example, from the rising cost of textbooks to the Flat World Knowledge approach to course content, textbooks are a significant issue for students. Draw from your experience as you bring together sources of information to illustrate a trend. Share and compare with classmates.

References

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

Learning Objectives

Front Matter Components

Written by Angela Eward Mangione and Katherine McGee

Category: [Memos, Proposals & Reports](#)

Published: 28 June 2013

Last Updated: 23 January 2018

You may wish to review:

- [Audience Analysis in Reports](#)
- [The Body of the Report](#)
- [The Back Matter](#)

Title Page

The title page provides the audience with the:

- Name of the report
 - This should appear 2 inches from the top margin in uppercase letters.
- Name, title, and organization of the individual receiving the report
 - Type "Prepared for" on one line, followed by two separate lines that provide the receiving organization's name and then the city and state. Some reports may include an additional line that presents the name of a specific person.
- Name of the author and any necessary identifying information
 - Type "prepared by" on one line, followed by the name(s) of the author(s) and their organization, all on separate lines.
- Date of submission
 - This date may differ from the date the report was written. It should appear 2 inches above the bottom margin.

The items on the title page should be equally spaced apart from each other.

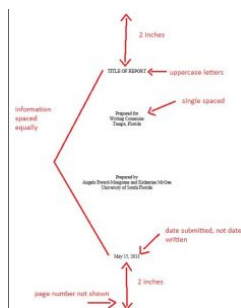


Figure 18 Title page example

A note on page numbers:

The title page should not include a page number, but this page is counted as page "i." Use software features to create two sections for your report. You can then utilize two different types of numbering schemes. When numbering the pages (i.e., i, ii, iii, etc.) for a formal report, use lowercase roman numerals for

all front matter components. Utilize arabic numbers for the other pages that follow. Additionally, if you intend to bind the report on the left, move the left margin and center 0.25 inches to the right.

A note on font:

If there is no specific preference for serif vs. sans serif font, choose one and use it consistently throughout the report. Do not utilize anything besides a traditional serif (e.g., Times New Roman) or sans serif (e.g., Arial or Calibri) font.

Letter of Transmittal

A letter of transmittal announces the report topic to the recipient(s).

If applicable, the first paragraph should identify who authorized the report and why the report is significant. Provide the purpose of the report in the first paragraph as well. The next paragraph should briefly identify, categorize, and describe the primary and secondary research of the report. Use the concluding paragraph to offer to discuss the report; it is also customary to conclude by thanking the reader for their time and consideration.

The letter of transmittal should be formatted as a [business letter](#). Some report writers prefer to send a memo of transmittal instead.

When considering your audience for the letter or memo of transmittal, make sure that you use a level of formality appropriate for your relationship with the reader. While all letters should contain professional and respectful language, a letter to someone you do not know should pay closer attention to the formality of the word choice and tone.

Table of Contents

The table of contents page features the headings and secondary headings of the report and their page numbers, enabling audience members to quickly locate specific parts of the report. Leaders (i.e. spaced or unspaced dots) are used to guide the reader's eye from the headings to their page numbers.



TABLE OF CONTENTS	
LETTER OF TRANSMITTAL	iv
EXECUTIVE SUMMARY	v
INTRODUCTION	vi
STATEMENT OF PURPOSE	vii
SCOPE OF STUDY	viii
REVIEW OF LITERATURE	ix
ANALYSIS AND DISCUSSION	x
CONCLUSIONS AND RECOMMENDATIONS	xi
REFERENCES	xii
APPENDICES	xiii
LIST OF FIGURES	xiv
LIST OF TABLES	xv
INDEX	xvi

Figure 19 Table of Contents example

The words “TABLE OF CONTENTS” should appear at the top of the page in all uppercase and bolded letters. Type the titles of major report parts in all uppercase letters as well, double spacing between them. Secondary headings should be indented and single spaced, using a combination of upper- and lowercase letters.

Executive Summary

An executive summary presents an overview of the report that can be used as a time-saving device by recipients who do not have time to read the entire report.

The executive summary should include a:

- Summary of purpose
- Overview of key findings
- Identification of conclusions
- Overview of recommendations

To begin, type “EXECUTIVE SUMMARY” in all uppercase letters and centered. Follow this functional head with paragraphs that include the above information, but do not use first-level headings to separate each item. Each paragraph of information should be single-spaced with double spacing between paragraphs. Everything except for the title should be left-aligned.

An executive summary is usually ten percent of the length of the report. For example, a ten-page report should offer a one-page summary. A 100-page report should feature a summary that is approximately ten pages.

Learning Objectives

Body of Report

Written by Angela Eward Mangione and Katherine McGee

Category: [Memos, Proposals & Reports](#)

Published: 28 June 2013

Last Updated: 23 January 2018

You may wish to review:

- Audience Analysis in Reports
- The Front Matter
- The Back Matter

Introduction

The body of a formal report begins with an introduction. The introduction sets the stage for the report, clarifies what need(s) motivated it, and orients the reader to its structure.

Most report introductions address the following elements: background information, problem or purpose, significance, scope, methods, organization, and sources. As you may have noticed, some parts of a formal report fulfill similar purposes. Information from the letter of transmittal and the executive summary may be repeated in the introduction. Reword the information in order to avoid sounding repetitive.

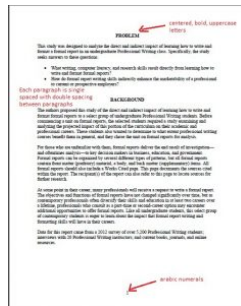


Figure 20 Report body

To begin this section, type “BACKGROUND” or “INTRODUCTION” in all uppercase letters. This functional head should be followed by the information specified above (i.e., background information, problem or purpose, etc.). You do not need to utilize any first-level headings in this section.

Because this section includes background information, it would be the appropriate place to address the needs of audiences that may need additional knowledge about the topic. Provide definitions of technical terms and instruction about the overall project if necessary. If you are uncertain if your audience needs a particular piece of information, go ahead and include it; it’s better to give your reader a little bit too much background than not enough.

Discussion of Findings

The Discussion of Findings section presents the evidence for your conclusions.

This key section should be carefully organized to enhance readability.

To begin, type “DISCUSSION OF FINDINGS” in all uppercase letters. Center this and all other functional heads. Follow “DISCUSSION OF FINDINGS” with a brief paragraph that previews the organization of the report.

Useful organizational patterns for report findings include but are not limited to:

- Best Case/Worst Case
- Compare/Contrast
- Chronology
- Geography
- Importance
- Journalism Pattern

Use a Best Case/Worst Case organizational pattern when you think that the audience may lack interest in the topic. When examining a topic with clear alternatives to your proposed solution, consider using a Compare/Contrast pattern. Geographical patterns work effectively for topics that are discussed by location.

When describing the organization of the report in the first paragraph, broadly identify how the material in the report is organized rather than state that the report uses a specific pattern (e.g. Chronology, Geography). For example, write, “The research findings address curriculum trends in three states: (a) Florida, (b) Georgia, and (c) North Carolina,” not, “This report uses a geographical organizational pattern.”

Follow the first paragraph with a first-level heading. Use first-level headings for all other major parts of this section. First-level headings should appear in bold, uppercase letters. Center first-level headings, but align any second-level headings with the left margin. Type any second-level headings in bold, upper- and lowercase letters.

As you present, interpret, and analyze evidence, consider using both text and graphics. Take into account what will be easiest for your audience to understand.

Include citations for all quoted or paraphrased material from sources as well; check with your organization as to whether they prefer parenthetical citations or footnotes.

Integrating Graphics

Formal report authors use graphics to present data in different forms. Paragraphs of text and complex or numerical data tend to bog readers down, making graphics a beneficial enhancement. Graphics also make data easier to understand, so they sometimes make a stronger impact on the audience.

Knowing when—and how—to effectively employ graphics is the key to successfully integrating them. Keeping the audience in mind is also critical.

Figure 19 summarizes uses and audience benefits for the most frequently employed types of graphics. The types of graphics are presented alphabetically to make them easier to remember.

GRAPHIC Graphic Type	USE This type . . .	BENEFITS The audience can . . .
Bar Chart	Represents data with the height or length of rectangular bars	Compare items Grasp a series of numbers
Flowchart	Illustrates a sequence of events with shapes connected by arrows	Grasp a series of steps
Line Chart	Shows changes in quantitative data over time or plots the relationship between two variables with one or more lines	Compare variables Visualize change over time
Map	Illustrates activities or trends on a map that represents geographically organized parts of a region, country, or the world	Compare geographical trends Grasp geographical relationships
Pie Chart	Depicts distribution of parts in a whole with wedges in a circle graph	Compare significance of parts and parts-to-whole relationship(s)
Table	Presents data or values in rows and columns	Compare data or values Grasp relationships between data or values

Figure 21 Types of graphics

Computers have made it easier for professionals to create effective graphics. Most of the graphics in Figure 19 can be created in Microsoft Office Word and Excel.

There may also be some occasions in which a formal report includes graphics from a particular print or online source. In these instances, it is critical to include a caption that presents the source of the graphic.

Learning Objectives

Back Matter Components

Written by Angela Eward Mangione and Katherine McGee

Category: [Memos, Proposals & Reports](#)

Published: 28 June 2013

Last Updated: 23 January 2018

You may wish to review:

- [Audience Analysis in Reports](#)
- [The Front Matter](#)
- [The Body of the Report](#)

Conclusions and Recommendations

The conclusions and recommendations section conveys the key results from the analysis in the discussion of findings section. Up to this point, readers have carefully reviewed the data in the report; they are now logically prepared to read the report's conclusions and recommendations.

Type "CONCLUSIONS AND RECOMMENDATIONS" in all uppercase letters. Follow this functional head with the conclusions of the report. The conclusions should answer any research questions that were posed earlier in the report. Present the conclusions in an enumerated or bulleted list to enhance readability.

Recommendations offer a course of action, and they should answer any problem or research questions as well. Think back to the expectations of your audience. Have all of their requirements been addressed?

Works Cited

All formal reports should include a works cited page; this page documents the sources cited within the report. The recipient(s) of the report can also refer to this page to locate sources for further research.

It is acceptable to follow MLA (Modern Language Association), CMS (Chicago Manual of Style), or APA (American Psychological Association) documentation style for entries on this page. Arrange all sources alphabetically. Refer to the latest edition of the appropriate style handbook for more information about how to format entries for print and electronic sources on the [Works Cited page](#)

Conclusion

While some of the formatting rules may seem tedious at first, they are necessary in order for your audience to better understand the report. Using a regulated format allows for a more universal organization that everyone will understand. Being aware of your audience's needs and expectations will allow for a strong report that will satisfy your employee and demonstrate your competence in your field.

Functions and Contents of Progress Reports

In the progress report, you explain any or all of the following:

- How much of the work is complete
- What part of the work is currently in progress
- What work remains to be done
- What problems or unexpected things, if any, have arisen
- How the project is going in general

Progress reports have several important functions:

- Reassure recipients that you are making progress, that the project is going smoothly, and that it will be complete by the expected date.
- Provide recipients with a brief look at some of the findings or some of the work of the project.
- Give recipients a chance to evaluate your work on the project and to request changes.
- Give you a chance to discuss problems in the project and thus to forewarn recipients.
- Force you to establish a work schedule so that you'll complete the project on time.
- Project a sense of professionalism to your work and your organization.

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Timing and Format of Progress Reports

In a year-long project, there are customarily three progress reports, one after three, six, and nine months. Depending on the size of the progress report, the length and importance of the project, and the recipient, the progress report can take the following forms:

- Memo—A short, informal report to someone within your organization
- Letter—A short, informal report sent to someone outside your organization
- Formal report—A formal report sent to someone outside your organization

In our course, you will write a progress report in the form of a thorough memo, and you will attach an outline to that memo to give your recipient an idea of the content in your final report. (See the chapter on Outlines for more information.)

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Organizational Patterns or Sections 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. In other words, the following three sections are key in any progress memo or progress report:

- Work accomplished in the preceding period(s)
- Work currently being performed
- Work planned for the next period(s)

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Other Parts of Progress Reports

In your progress memo or report, you also need to include the following sections: (a) an introduction that reviews the purpose and scope of the project, (b) a detailed description of your project and its history, and (c) an overall appraisal of the project to date, which usually acts as the conclusion.

- Opening paragraph introducing the purpose of the memo and a reminder about the project topic
- Summary of the project
- Specific objectives of the project
- Scope, or limits, of the project
- Research gathered

- Overall assessment or appraisal of the project at this time

References

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Chapter 8: Oral Reports

Anna Goins; Cheryl Rauh; Danielle Turner; and Daniel Von Holten

Learning Objectives

Presentations

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

Some common scenarios for workplace presentations can include:

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

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

Analyzing Audience and Constraints

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

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

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

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

Types of Presentations

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

Informative

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

Persuasive

This type of presentation could be meant to influence the audience's point of view or convince the audience to follow a particular course of action. Typically, this will involve presenting evidence and logical arguments in addition to engaging your audience. A proposal could be a type of persuasive presentation as could any sales related presentation like scenario 4 listed above.

Goodwill/Ceremonial

These types of presentations frequently show up at special events like weddings, award ceremonies, and even funerals, and are generally performed as a speech with little to no visual aid. The purpose is to generate goodwill and basically have a positive impact on the audience's emotional state. In a professional setting, you may have to give a talk at a special event like an employee of the year celebration or celebrations of special events related to your company or the company's location. Something like

scenario 2 could be likely if your company invests in community relations. They differ from other presentations that they frequently serve a ceremonial or even ritual-like role in their setting.

Presentation Formats

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

Monologue

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

Q&A

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

Group Presentation Formats

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

Group Integrated

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

Group Divided

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

Structuring a Workplace Presentation

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

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

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

Opening a Presentation

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

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

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

2. **Establish your credibility.**

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

3. **Define a purpose or objective.**

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

4. **Provide an agenda or overview.**

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

5. **Offer background information on your subject.**

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

Organizing Body of a Presentation

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

1. **Establish an organizational pattern that suits your purpose.**

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

2. **Clearly state and develop your main points.**

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

Closing a Presentation

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

1. **Bring the presentation back to the agenda.** Signal the end of your presentation by restating your main points just like you do in your writing.
2. **Offer any recommendations.** These recommendations should be based on the information and evidence provided in the body of your presentation.
3. **Give your audience something to do with the information you shared:** Make a call to action or give them a question to reflect on, *etc.*
4. **Solicit questions.** You may want to transition into a Q & A at the end of your talk.
5. **Thank your audience.**

Visual Tools to Support Your Talk

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

1. **Be consistent.** When designing your visual aids, repeat patterns, font selection and size, and limit the complexity of slides helps readers to recognize important information and to process information more efficiently.
2. **Keep text simple and minimal.** Think of text in visuals as an emphasis tool. Too much text can draw attention away from your message. Images should be used to add depth to verbal content. For example, limit the number of bullet points on a slide to 4-6.
3. **Use accessible design.** As with document design, be mindful of the readability of your visual. Also, think about what the type you choose conveys to your audience.
4. **Integrate visuals.** Don't just show them; talk about them, and gesture to them.

5. **Consider culture.** If your audience includes individuals from a culture different than your own, be mindful of avoiding jargon, cliché, and slang. In general, it's good practice to select visuals that are culturally inclusive.

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

Delivery Techniques

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

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

Activities

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



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Appendix A- Research

Bay College

Learning Objectives

Research Overview ^[37]

Being a good technical writer also means being an effective researcher. This includes finding accurate information from trustworthy sources, seamlessly incorporating the information into a document, and knowing how to cite, or give credit, to the original source.



[38]

MLA and APA

In this course, you will be asked to research and then present your research in technical documents. When doing this, give credit to others' ideas that you use. We do this by documenting sources.

There are different ways to format when documenting research. Many students have completed research papers using MLA (Modern Language Association) since this is what is most often used by English teachers. However, APA (American Psychological Association) is also an acceptable option and it often applies to more students and their majors. This being said, MLA and APA are simply ways to format research. Don't let the task of research be daunting. When documenting source for this class, you don't have to memorize how to cite a book vs. an online article; you simply have to know how to use our class textbook or an online resource to cite your information.

What to Document

Researchers document **anything that is quoted**. This is a phrase, sentence, paragraph, or longer section taken from a source. Make sure to place quotation marks around the borrowed material to show that it is the exact phrasing used from a source.

Paraphrased or summarized information also needs to be documented. These are ideas taken from someone else that you put into your own words. The language used needs to be original and fresh. The writer cannot simply switch a sentence around and switch out a few words. The writer must completely put the source's ideas into the writer's own words. Quotation marks are not used but the writer does use a textual citation to give credit to the original source.

Any visuals, graphics, and pictures taken from anywhere need to be cited. Often, individuals think they can snag an image from Google and copy and paste it into a paper or presentation without citing it; this is plagiarism. Anything that was not created in whole by the writer needs to be cited.

In short, always give credit to another person's ideas or work; never pass them off as your own.

How it Works

When taking information from another source, give credit by doing two things:

1. **Use textual citations.** Cite the source within the text of the document to show which section of your document was taken from the source. This is called a "textual citation." It goes after the information the writer borrowed and consists of a few pieces of

information in parenthesis that gets the reader to the list of references at the end of the document which has all of the information for the source.

Textual citations in APA usually consist of the author's last name, a comma, the year it was published, another comma, and a page number (if there is one). These are put within parentheses.

Examples of Textual Citations:

- This issue was identified and revealed more than 50 years ago (Abramson, 2000).
or
- Abramson (2000) identified and revealed this issue more than 50 years ago.
or
- The greenhouse effect is a controversial one that some people are not taking serious (Smith, 2014, p. 56).

2. Link every textual citations used to the list of references at the end of the document. Create a “references” page at the end of your paper. Textual citations are a way to get the reader to the list of references where all of the information to find each source used within the paper is located. The textual citations must match the list of references. You never have a textual citation that isn't covered in the list of references or a source cited in the list of reference that doesn't have a textual citation. They go together. Consider them a couple.

Key Takeaways

Purdue Owl Website

For additional tips and samples of APA textual citations, visit the following website and skim through it: [Purdue OWL: APA Formatting](#). For more information on MLA textual citations, visit: [Purdue OWL: MLA Formatting](#). This website works well because it is reputable, and it can be accessed when our class ends. In fact, many colleges and universities regularly use it. Save this site on your computer, and use the links on the left side of it to create textual citations and a list of references at the end of a document.

American Psychological Association Website

This is another site that can help with APA: [APA: American Psychological Association](#). It is the official APA website.

Modern Language Association

This is another site that can help with MLA: [MLA: Modern Language Association](#). It is the official MLA website.

References

[37] Technical Writing. Authored by: Dr. Elizabeth Lohman. Provided by: Tidewater Community College. Located at: <http://www.tcc.edu/>. Project: Z Degree Program. License: [CC BY: Attribution](#), revised by [Amber Kinonen](#), edits included in italics

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Appendix B- Punctuation, Grammar, and Conventions of English

Bay College

Exercises

Use this link for assistance with grammar, punctuation, or other questions:

[Grammar & Punctuation Activities and Instructions](#)



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