

Module 1: Introduction to Technical Writing: Memos

Overview

Technical writing is "writing that gets things done" (Woolever 1999). Unlike academic or creative writing, technical writing serves everyday needs. It can take the form of e-mail messages, memos, reports, proposals, and manuals. You engage in technical writing when you jot down instructions for how to operate a machine, or when you inform potential clients of the benefits of your product in a newsletter. Technical writing should be accurate, clear, concise, consistent, complete, and correct.

In this module, we will study the attributes of effective technical writing, and we will provide tips for avoiding habits that make technical writing cumbersome and ineffective. Additionally, we'll look at ethical guidelines to follow in technical writing. We'll complete the module by reviewing memos and e-mail messages written for the workplace.

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Module 1: Introduction to Technical Writing: Memos

Objectives

After completing this module, you should be able to

- define *technical writing*
- list the main attributes of effective technical writing
- cite the ethical principles involved in technical writing
- evaluate and write successful e-mails, letters, and memos

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Module 1: Introduction to Technical Writing: Memos

Commentary

Topics

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Technical Writing

What is technical writing? Think of the reading you do in the workplace. You read e-mail messages, memos, reports, and instructions. You read to make decisions and to acquire knowledge about procedures, projects, and tools. Whenever you read a health, medical, or scientific publication such as *Scientific American*; a manual to assemble a piece of furniture or to use a new device; or a resume or a cover letter from a job applicant, you are reading technical writing. **Technical writing** is nonfiction writing targeted to a specific audience and created for a specific purpose, such as to inform or persuade.

You probably encounter technical writing many times during the day. At work, you may read or write bulletins and e-mail messages. At home, you may read manuals to assemble a bicycle or to program your cell phone. Think about the differences between this type of writing and the writing and reading you do for pleasure or in your academic career.

At school, you have been exposed to many types of writing: stories, essays, research papers, articles, etc. Your own writing probably has one primary purpose: to show your professor that you have mastered a required subject. Technical writing needs to address the needs of many different people. It is written to readers at all levels, from specialist to novice, and to people with widely different backgrounds.

What makes for good technical writing? Technical writing must be honest, accurate, accessible, concise, and professional in appearance. You probably know people who have lost promotions because of poor writing skills, or friends who didn't land an interview because they handed in a resume riddled with errors. You have most likely struggled with flawed instruction manuals and received e-mail messages and memos filled with embarrassing mistakes. Flawed writing can have serious consequences; it can cause lost time and revenue, it can lead to equipment failure, and—in the most extreme cases—it can have legal ramifications. Conversely, solid writing in the workplace can lead to promotions, increased profits, and improved customer relations.

Writing Effectively

Effective technical writing meets certain criteria. It

- addresses specific readers
- utilizes elements of design
- has a specific purpose
- is accurate, clear, concise, consistent, and complete

Below, we discuss these four criteria.

Addresses Specific Readers

Technical documents are tailored to meet the needs of a particular reader or readers. You must take into account your readers' attitudes, background, interests, and basic position in life to decide how to write your technical document. Use a "you" attitude when you write. With a **"you" attitude**, you address your readers in a personable tone and focus on what they want to gain from the document rather than on what you want to gain from them.

Utilizes Elements of Design

Clear technical writing effectively uses **white space**, the space in margins and in between sections of text. Solid technical writing also includes appropriate use of headings, graphics, lists, and alignment to help visually "chunk" information for readers.

Has a Specific Purpose

The main purpose behind most technical writing is to convey information and ideas accurately and efficiently. Most technical documents are written to inform readers about a specific subject or to persuade readers to make a decision or come to a conclusion.

Is Accurate, Clear, Concise, Consistent, and Complete

Effective technical writing needs to be clear, and not filled with jargon and legalese. Phrases such as "pursuant to your desire to be informed" are archaic and cumbersome. A technical document should contain straightforward wording that is short and easy to understand. The document must present all information in a consistent manner.

Figure 1.1 shows two versions of the same set of software user instructions. The instructions on the left are blocked in paragraphs. Those on the right have visual cues to assist the reader in finding help for specific tasks and in processing information. Scroll your mouse over the numbers on the right to see how the author improved the original document.

Figure 1.1
Software User Instructions

<p>Suppose you want to provide users with more information about saving a document in Microsoft Word. You can direct them to the "Saving your Document" section within the Microsoft Word resource guide by adding a link in your document to that section of the resource guide. This section discusses how to link to a topic within one of the resource guides.</p> <p>To create a link in</p>		<p>Creating a Link ¹(Mouseover 1 linked here)</p> <p>To create a link from any point in a lesson to a topic in one of the resource guides, follow these steps in DreamWeaver:</p> <p>²(Mouseover 2 linked here)</p> <ol style="list-style-type: none"> 1. Highlight the text you wish to link. ³(Mouseover 3 linked here) 2. Select Insert > Hyperlink. 3. In the Hyperlink dialog
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DreamWeaver from any point in a document to a topic in one of the resource guides, first select the Hyperlink option from the Insert menu. Then, in the Hyperlink dialog box, you type the name of the link in the Text field. For example, if you want to add a link to the "Saving your Document" topic within the Microsoft World resource guide, you could type "Saving your document." Next, in the Link field, the complete pathname for the resource guide is typed followed by a hash symbol (#) and then the name of the topic. For example, you might type the following for the saving your document topic in the Microsoft Word resource guide. Finally, click the OK button.

The Microsoft Word Guide contains a number of help sections within this guide. For more information about cutting, copying, and pasting text, you can go to the topic Cut/Copy/Paste. The help topic about searching in a document is found in the section, Find/Replace. You can get information about replacing text in a document in the topic, Replace. To save a document, look in the section Save. You will be able to set up a page by checking the section Set Page.

box, type the name of the link in the Text field. For example, if you want to add a link to the "Saving your Document" topic within the Microsoft World resource guide, you could type "Saving your document."

4. In the Link field, type the complete pathname for the resource guide followed by a hash symbol (#) and then the name of the topic.
5. Click the OK button.

Additional Help ¹([Mouseover 1 linked here](#))

The Microsoft Word Guide contains a number of help topics within this guide. ⁴([Mouseover 4 linked here](#))

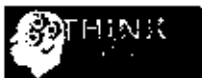
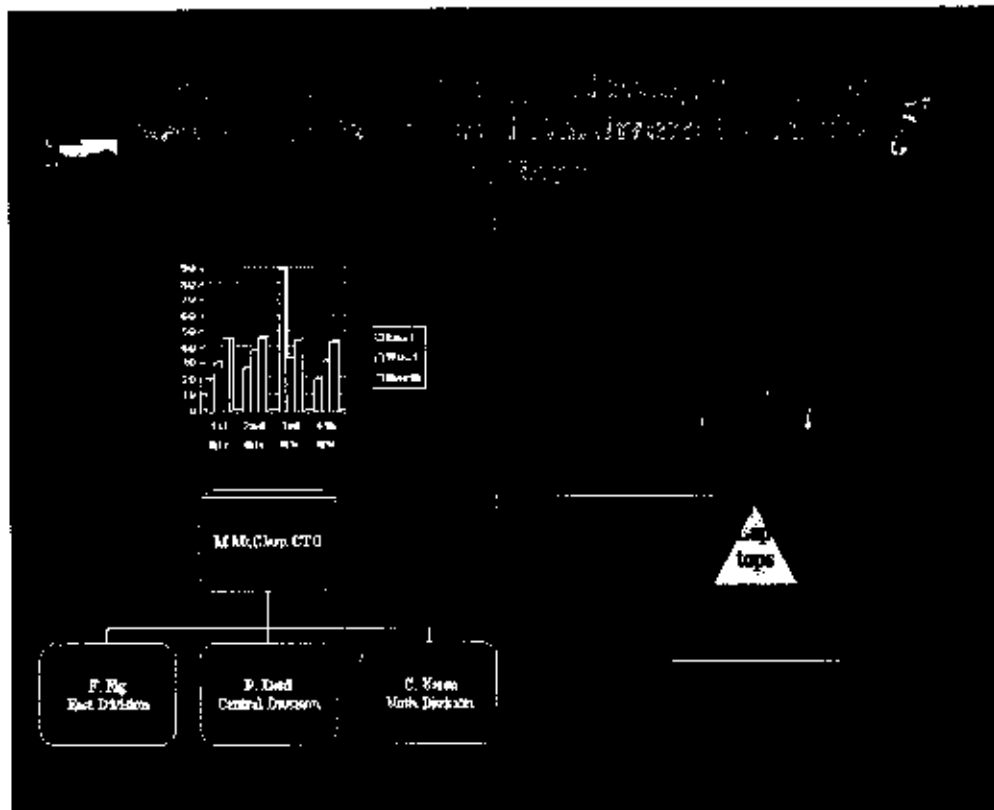
To do the following	Select this topic within the resource guide
Cut, copy, and paste text	Cut/Copy/Paste
Search in a document	Find/Replace
Replace text in a document	Replace
Save a document	Save
Set up a page	Set Page

Source: Instructions taken and modified from George Mason University 2004, Code Reference Manual

Now, let's look at another type of document. Figure 1.2 shows slides for a PowerPoint

presentation for a technology training course for managers. Look at the presentation and see if you can determine how it could be more effective. Click on the pop-up link below to discuss your ideas.

Figure 1.2
Technology Presentation



Think About It 1.1: Technology Presentation

Ethics in Writing

As a writer in the workplace, you have a responsibility to act ethically within your corporate culture and within society. You must consider the legal ramifications of your work. You also have a moral obligation to act fairly and honestly on behalf of clients and customers. Your employer may ask you to sign confidentiality or conflict-of-interest statements to ensure that you consider ethical concerns when writing technical documents.

The Society for Technical Communication (STC) has created an ethical policy statement for technical writers. Figure 1.3 shows an abridged version of the STC's guidelines. You can find a link to the complete version in the Toolkit section of this course, if you would like to print it out for your reference. You can also find a link to the STC Web site.

Figure 1.3
STC Ethical Principles for Technical Communicators

Legality

We observe the laws and regulations governing our profession.

We meet the terms of contracts we undertake. We ensure that all terms are consistent with laws and regulations locally and globally, as applicable, and with STC ethical principles.

Honesty

To the best of our ability, we provide truthful and accurate communications. Before using another person's work, we obtain permission. When we advertise our services, we do so truthfully.

Confidentiality

We respect the confidentiality of our clients, employers, and professional organizations. We disclose business-sensitive information only with their consent or when legally required to do so. We obtain releases from clients and employers before including any business-sensitive materials in our portfolios or commercial demonstrations.

Quality

We endeavor to produce excellence in our communication products. We negotiate realistic agreements with clients and employers on schedules, budgets, and deliverables during project planning.

Fairness

We respect cultural variety and other aspects of diversity in our clients, employers, development teams, and audiences. If we discern a conflict of interest, we disclose it to those concerned and obtain their approval before proceeding.

Professionalism

We evaluate communication products and services constructively and tactfully, and seek definitive assessments of our own professional performance. Additionally, we assist other persons in our profession through mentoring, networking, and instruction.

Source: Society for Technical Communication (STC) Board of Directors 1998, STC Web site

Correspondence in the Workplace

Memos and e-mail messages are the most common forms of business correspondence today. Corporate employees write these documents daily. We write them for a variety of reasons: to ask questions, to report on projects, to propose options, to invite colleagues to birthday lunches, etc. Because e-mail messages and memos are used so frequently in the business world, learning to structure and write them effectively is a necessity.

You can probably think of many mistakes you have seen colleagues make in writing e-mail messages: burying subject matter; accidentally replying to all; providing incorrect dates and

figures; flaming, or writing when angry; making spelling errors; failing to include attachments; and so on. Results of such mistakes can range from personal embarrassment to job dismissal.

Because we send and receive a vast pile of e-mail messages and memos each day, these documents must be well-organized. Try to present information so that it only has to be read once. The following guidelines will help you in composing a memo or e-mail message:

- A specific subject line is extremely important. Write the subject line so that the reader will immediately glean the main point of the e-mail message. If the note is about a particular project, include the name of the project in the subject line.
- In your opening, make personal contact with the reader to catch his or her attention.
- Place the most important message at the beginning and at the end of your memo or e-mail note.
- If your memo or e-mail note contains negative feedback, buffer or "sandwich," the criticism or bad news with positive messages.
- Use visual cues to guide your audience through your memo or e-mail message. Lists, headings, bullets, fonts, and white space can help direct your readers through the document.
- Send background or supporting information as an attachment.
- Avoid pompous and wordy phrases, and make your writing clear and concise. Most people do not have time to wade through a long e-mail message—they want to pick up the information as quickly as possible.

Figure 1.4 shows a memo sent by an office manager to his staff. Scroll your mouse over the numbers in the memo to see the ways in which it could be improved.

Figure 1.4
Management Memo

TO: All Document Management Office Staff
FROM: R. Frank, Department Manager
SUBJECT: Work Hours ¹(**Mouseover 5 linked here**)

Due to the location of the Document Management Office, ²(**Mouseover 6 linked here**) we have a great number of people from other offices ³(**Mouseover 7 linked here**) who come into our office. ³(**Mouseover 7 linked here**) We have tried to minimize the disruption within our office ³(**Mouseover 7 linked here**) by implementing a plan to position the proposal-ordering and pick-up window as close to the stairs as possible. In spite of these efforts, we still have a multitude of people coming into the office for social visits.

One or two minutes for a social visit is no

big deal, but many conversations go on for five minutes or more. If everyone in the office had one five-minute visit each day, the affect ⁴(**Mouseover 8 linked here**) would be four hours of lost time. We have a high workload, and need to be as productive as possible.

It is my recommendation ⁵(**Mouseover 9 linked here**) that, if anyone initiates a social conversation with you that lasts more than one or two minutes, it is suggested ⁵(**Mouseover 9 linked here**) that you should say that you are busy and that the person should come back during your break or during lunch to continue the conversation.

On a more positive note, I would like to thank each and every one you for the extra effort that you have expended as a result of our heavy workload. We are very lucky to be in an industry that is expanding. ASTRO is the leader of our industry; we offer the most comprehensive Stereo-lithography services in the world. There is no reason to be complacent, however, as the competition is working hard to catch up. ⁶(**Mouseover 10 linked here**)

We must continue to exploit synergies ⁷(**Mouseover 11 linked here**) wherever possible. Again, I want to thank you. Keep up the good work. ⁸(**Mouseover 12 linked here**)

Can you state the author's main point in one sentence? You probably had to read the memo more than once to understand what the author was trying to say. When writing this memo, the author should have followed these five steps. They apply both to memos and to e-mail messages:

1. State the main point in the subject line and in the first line of the memo.
2. Tell your readers clearly what you expect of them.
3. Carefully organize your information. Chunk similar pieces of information together.
4. Maintain a friendly tone, but keep the memo as brief as possible.

5. Proofread your memo, omitting unnecessary information and correcting mistakes in spelling and grammar.



Try This 1.1: Rewrite the Memo

Now, let's consider the matter of content in e-mail messages and memos. An e-mail message can be well-written, but can still be wrong for the workplace. E-mail messages and memos concerned with telling jokes or relating anecdotes may annoy colleagues and supervisors; those focused on individual problems or dilemmas may indicate that the sender does not know how to separate work and personal life.

Figure 1.5 shows an e-mail note written by an employee in a research and development company. She sent this message to every person in the TRAB list (400 employees). As you read this e-mail message, consider whether or not it is appropriate for the workplace.

Figure 1.5
TRAB List Memo

To: TRABlist
From: L. Smith
Subject: Carpal Tunnel Syndrome

I was very excited to read the posting about the carpal tunnel syndrome information session that was held last night. Unfortunately, I was unable to attend due to a previous engagement. I was wondering if anyone who attended the meeting could debrief me on what was said. Carpal tunnel is something that I have dealt with for many years, and that has gotten worse with the growing amount of time I spend on computers.

It first began when I was a teenager, and played the guitar all the time. I was forced to reduce the amount of time I spent doing something I love, but now I can't stop working on computers because, as we all know, they are a major part of life these days! I have tried various treatments throughout the years, but most only offer temporary relief, if any. I make sure to use a hand rest for the keyboard to my computer, but even that doesn't seem to work for me the way it does for other

people.

I was hoping that last night's session gave new insight into an old problem. I would appreciate any info anybody could pass along to me. If anyone has any ideas, even if they aren't from last night's meeting, I would appreciate hearing them. You can post them to the list or e-mail me directly.

Thanks for your help,

L. Smith

In the pop-up below, discuss the e-mail message. Consider whether this type of note should be sent at work, and how the author could have best handled her curiosity about the meeting.



Think About It 1.2: TRABList Memo

References

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Mouseover 1: Headers show your readers where to find specific information.

Mouseover 2: Shorter paragraphs are easier to read in print and online.

Mouseover 3: Numbered lists help your readers follow instructions that have multiple steps.

Mouseover 4: Tables help you organize information into a clear, easy-to-follow format.

Mouseover 5: This subject line is vague. "Work Hours" could mean anything. In your subject lines, clearly convey the main point of the memo. Here, the author could use a line such as "socializing at work."

Mouseover 6: This opening is verbose. The author could substitute "Due to the location. . ." with "Because we have so many visitors. . .", getting right to the point.

Mouseover 7: The continual use of the word "office" is repetitive. Keep your memos as brief as

possible, and avoid unnecessary wording.

Mouseover 8: "Affect" is the wrong word here—it's a verb, and the author means "effect," a noun, or, better yet, "result." Always proofread memos before sending them out.

Mouseover 9: This phrase is unnecessary and wordy. The manager should tell his employees what he wants them to do with minimal padding.

Mouseover 10: Here, the author is stringing together general thoughts on the industry and the competition. This has nothing to do with the subject of the e-mail. It is a misguided attempt to appear friendly, but just tries the readers' patience.

Mouseover 11: This is a meaningless phrase. People sometimes try to sound intelligent and professional by using jargon and corporate-speak. Be clear and direct, and your readers will appreciate your efforts.

Mouseover 12: It is good to "sandwich" negative feedback with positive messages, but does this author's tone ring true? For what is the author thanking the readers? Try to be as sincere as possible in your messages. If you can not be positive, at least be succinct.

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Popup 1:

Think About It 1.1: Technology Presentation

1. Is this an effective presentation? Why or why not?

2. What would you do to improve this presentation?

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Popup 2:

Try This 1.1: Rewrite the Memo

1. Rewrite the memo above, incorporating the five steps you have read.

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Popup 3:

Think About It 1.2: TRABList Memo

1. What is wrong with the subject line of this e-mail message?
2. What is the tone of the e-mail message?
3. Should the author have sent this e-mail message to 400 employees? Why or why not?
4. What do you think of L. Smith after reading this e-mail message? What might her supervisors think?
5. How could L. Smith have gone about getting the information she wanted more effectively?

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