The Essentials of Technical Communication

THIRD EDITION

ELIZABETH TEBEAUX
TEXAS A&M UNIVERSITY

SAM DRAGGA
TEXAS TECH UNIVERSITY

New York Oxford
Oxford University Press

Oxford University Press is a department of the University of Oxford.
It furthers the University's objective of excellence in research,
scholarship, and education by publishing worldwide.

Oxford New York
Auckland Cape Town Dar es Salaam Hong Kong Karachi
Kuala Lumpur Madrid Melbourne Mexico City Nairobi
New Delhi Shanghai Taipei Toronto

With offices in
Argentina Austria Brazil Chile Czech Republic France Greece
Guatemala Hungary Italy Japan Poland Portugal Singapore
South Korea Switzerland Thailand Turkey Ukraine Vietnam

For titles covered by Section 112 of the US Higher Education Opportunity Act, please visit www.oup.com/us/he for the latest information about pricing and alternate formats.

Published by Oxford University Press
198 Madison Avenue, New York, New York 10016
http://www.oup.com

Library of Congress Cataloging-in-Publication Data
Tebeaux, Elizabeth.
The essentials of technical communication / Elizabeth Tebeaux, Texas A&M University, Sam Dragga, Texas Tech University. — Third edition.
pages cm
Includes index.
ISBN 978-0-19-937999-6
1. Technical writing. 2. Communication of technical information.
I. Dragga, Sam. II. Title.
T11.T295 2014
808.06'66—dc23
2014010176

Printing number: 9 8 7 6 5 4 3 2

Printed in the United States of America
on acid-free paper

S

cause thermostats differ,
pany for instructions.
tures are not given, hold
meter under faucet for
irst thing in the morning
ter water use. If reading
nostat on heater,
urer's instructions, and
ometer.

u do not have an electric,
heater, you probably have
ystem. Contact your fuel
mperature lowered. If you
ontact the building
ssible options for
er temperature. Reducing
l not affect the heating
e.

rmostat setting of 120
9 degrees Celsius) may be
tial water heaters to reduce
of most tap water scald
should consider lowering
lowest settings that will
ds for all clothing and dish

temperature for granted.
fore using, especially when
young children. Leaving a
n the bathroom, even if only
cause serious injuries. Your
is the best defense against
ng to infants and young

lication 5098 009611 032012

.gov • www.SaferProducts.gov

2

Writing for Your Readers

Before you begin to plan your document, first think about your readers and then your purpose. Every decision you make in developing your document should reflect your audience, their needs, and your purpose.

Avoid becoming absorbed in ideas and information you plan to include. Never forget that the person or group who will read the document may have a very different perspective of the content. Your readers cannot climb into your mind and know your thoughts. When you carefully analyze your readers, you can often design and write your report in a way that helps them understand what's in your mind. Reexamine Case Documents 1-1A, 1-1B, and 1-1C at the end of Chapter 1. In what ways has Matt shown his awareness of the needs of readers?

Quick Tips

To develop any communication, you have three main goals that connect reader, purpose, and context:

1. You want your readers to understand your meaning exactly in the way you intend.
2. You want your writing to achieve its goal with the designated readers.
3. You want to keep the goodwill of those with whom you communicate.

Understand Your Readers—The Heart of the Planning Process

To achieve the three goals just listed, you must pursue the following four tasks, both before you begin to write and while you are actually composing your document:

1. Determine as fully as possible who will read what you write.
2. Know the goals you want your writing to achieve and the business context in which you need to communicate.
3. Understand your role in the organization as a writer and how your role should be reflected in what you write.
4. Determine the content by considering your readers' frame of reference and your purpose in writing.

Keep in mind that business readers want answers now. Employees in most organizations, particularly large ones, have more to read than they can and will read. If you want your letter or report to be read, be sure that important information occurs on the first page of a report and in the first paragraph of an e-mail, memo, or letter and that you answer the following questions your readers will ask:

- What is this?
- Do I have to read it?
- How does it affect me?
- What will I have to do?
- What are the main ideas?

If you answer their questions at the beginning of your document, readers may be willing to read more of your report, e-mail, or letter.

To answer these questions in the minds of your readers, you will have to answer three questions yourself about the document you are writing:

- Who will read what I write?
- Who will act on what I write?
- Who else may read what I write?

In many cases, your primary reader will transmit your document to someone else for action. Perhaps this individual is one of your secondary readers or someone unknown to you.

Determine your readers and their perspectives. When you consider your readers, determine as much as you can about them.

- How much do your readers know about your topic?
- Do your readers have expertise in this area?

Readers with technical expertise in the area you discuss have different needs (and often different perspectives) from readers who lack technical expertise.

- How much do your readers know about your topic?
- Do you know or can you estimate your readers' educational levels?
- Do you know your readers' cultural backgrounds?

If you work in an organization that does business with readers from other cultures, plan to do background reading on these cultures.

- Will your readers have interest in what you write? If not, how could you present your message to make it appealing?
- What kind of relationship do you have with these readers? Do you know the readers' attitude toward you, the subject matter you need to communicate, the job you have, and your area within the organization? Do you have credibility with these readers?

A host of factors determine your readers' perception: education, family, geographical and cultural background, job responsibilities, rank in the organization, age, life experiences, and gender—just to name a few demographics that define how people see the world. How much your readers know about your topic determines what you say and the technical level of your presentation.

- How well do you know your readers?

You may not know your readers personally. However, if you know an individual's level in the organization, the responsibilities associated with that level, and the kind of technical expertise your reader has, this information will help you decide what you need to say and how to present your information. Knowing your readers' responsibilities in the organization can help you anticipate their attitude—if your subject will interest them. Because people tend to read only what will help them, try to relate your message to your readers' job. Knowing the readers' attitude toward the topic addressed in your message will help you determine how to present your information.

- Who else might read what you write?

Most reports and letters have distribution lists: the names of those who receive copies. A person on the distribution list may be the person who will ultimately act on what you write. Thus, the needs and perceptions of those who receive copies should be considered.

- Why is each person on the distribution list receiving a copy?
- How much does each person on this list know about your topic?

Sometimes your primary reader may know the situation you are discussing, and the purpose of the report may be to inform others within the organization by going through proper channels.

- What situation led to the need for this document?

Often, you can better understand your reader's perspective if you understand the situation that requires you to write this document. The need for written communications develops from interactions of people involved in a work environment. To be able to select content, level of language (technical or general), and amount of explanation needed in a business context, a writer must be careful to determine the needs of each reader. Closely examining a situation requiring a written response may even help you determine what you need to tell your readers and how to present your message.

Determine your purpose.

- Do you know why you need to write this document?
- What do you want to achieve with your document?

Determining why you are writing—what you want to achieve—equals the importance of determining your readers. *Purpose always relates to readers.* And you may have more than one purpose. For example, you may be writing to inform, to provide information, to recommend action. In addition, what you say may serve as documentation—proof of your efforts—to show that you have provided the information requested. Written messages that document employees' activities serve a major function in today's business organizations. Without documentation, you may have difficulty proving that you performed specific tasks.

Understand your role as a writer.

- What position do you have in the organization?

As an employee, you will be hired to perform the duties that define a particular job. As the one responsible for performing specific tasks, you will be communicating with employees above you, below you, and on your own level. In writing to individuals in any group, you will communicate not as you would with a friend or family member but as the person responsible for the work associated with that position. When you write, you create a personality that should fit the position you hold.

To have credibility as a writer in an organization, the image that you project should be appropriate to your position. What you say and how you say it should reflect your level of responsibility in the organization—the power relationship that exists between you and the reader. The image you project will change, depending on your readers. You will project the image of a subordinate when you write to those higher than you, but you will transmit the image of the supervisor to those who work directly under you. When you communicate with others on your own job level, you will convey the image of a colleague. Good writers have the ability to fit their message to each reader.

Plan the content.

- What ideas should you use to achieve the goals of the message?
- What ideas should you omit?
- How should you arrange your ideas?

le involved in a work envi-
ıage (technical or general),
ext, a writer must be careful
ning a situation requiring a
ou need to tell your readers

nt?
ıt?

to achieve—equals the im-
s *relates to readers*. And you
nay be writing to inform, to
on, what you say may serve
at you have provided the in-
t employees' activities serve
Vithout documentation, you
ic tasks.

ıties that define a particular
asks, you will be communi-
your own level. In writing to
as you would with a friend
ıe work associated with that
that should fit the position

the image that you project
y and how you say it should
–the power relationship that
ject will change, depending
ordinate when you write to
ge of the supervisor to those
ıte with others on your own
od writers have the ability to

f the message?

Once you have analyzed your readers and your purpose, you can begin to decide what you want and need to say, then how you will phrase and arrange your ideas.

- How do you want your message to sound?

Knowing how your message should sound will always be critical. Always try to convey a respectful tone commensurate with your position in the organization. How a message is conveyed may often be as important as the content.

Case 2–1 shows how a writer's assessment of audience and purpose changes the content and presentation in the e-mails for each reader involved in the situation.

Anticipate the context in which your writing will be received.

- How will readers use your writing?

Once your document has reached its primary destination, it may be placed in a stack for later reading; it may be skimmed and then routed to the person who will be responsible for acting on it; it may be read, copied, and distributed to readers unknown to you; it may be read and used as an agenda item for discussing a particular point; or it may be read carefully and later used as a reference. Knowing how readers to whom you write will use the documents they receive can often guide you in deciding not only what to say but also how to organize the information and arrange it on the page.

The Basic Parts of the Composing Process

The composing process, integral to your analysis of audience, has six main stages:

1. **Analyzing** the situation
2. **Choosing/discovering** content
3. **Arranging** content
4. **Drafting**
5. **Revising**
6. **Editing** the finished draft

A writer who tries to do all stages at once usually creates a document that will fail. Research has shown that good writers usually follow a standard process—one that will make your writing tasks easier and the results more effective.

Analyzing the writing situation—purpose, readers, and context. The first step in composing is the most critical. In this step, you need to know *why* you need to write: what you want to achieve with your document, what situation or problem has led to the necessity of your writing this document. Then, you need to consider your readers—those who will or may read your document.

Every technical or workplace document responds to a specific situation. Each document has a targeted audience. Writing responds to both—the situation and the readers in that situation. When you write, you do not simply compile information about a subject.

Choosing/discovering content. You select content for your document based on your purpose, *what* your reader needs and *how* you think your reader perceives the subject.

As you search for information, remember your purpose, what you want your reader to know and do with what you write.

Then, begin to list ideas you can use to develop your topic. Based on these ideas, ask yourself what additional information you will need to locate. Don't like what you wrote? Delete it. You may want to begin your document by writing your purpose at the beginning to help you stay on track.

ıds to a specific situation. Each
ıds to both—the situation and
lo not simply compile informa-

ntent for your document based
you think your reader perceives

r purpose, what you want your

op your topic. Based on these
u will need to locate. Don't like
your document by writing your

Case 2-1

As Case Document 2-1A indicates, Running Brook Neighborhood needs money to maintain the entrance to the subdivision. Charles Fields, treasurer of the property owners' association, has decided to write a flyer to place in each mailbox of the Running Brook homes. He has received very little money for the required upkeep. He drafts his request, but before he makes copies for the project, he asks a neighbor for her opinion of his flyer. She offers to revise the flyer (Case Document 2-1B) because she sees the difference between his version and what she thinks should be written. He makes the required number of copies, places one in each mailbox, and receives more than the amount RB needs for its entrance maintenance.

CASE DOCUMENT 2-1A

Subject: Running Brook Subdivision Market (RBSM) Fund

I have been remiss in reporting the status of the RBSM fund. In the past, an oral report was delivered at the annual subdivision picnic. I did not make such a report at the last picnic since I felt the information should be provided to all RB residents and not just to picnic attendees. The report for 2011–2012 will be distributed with the flyers that announce the 2013 Running Brook picnic. Since the subdivision has several new families, a historical element was added to this report.

The POA supplies each subdivision with a marker, which generally is located in the middle of a small landscaped area. Maintenance, decoration, and any embellishment of the marker area is the responsibility of the residents of the subdivision. Resident involvement in the care of the RBSM began in December 2009 when a waterline and meter were installed at a cost of $450.00 and obligation to pay an annual water usage fee was assumed. The fee allows for consumption of 4,000 gallons of water each month. Water consumption above 4,000 gallons incurs an additional charge, an event that has occurred during the hot summer months of the past 3 years. The fee has increased from $106.98 to $123.30 over the past 3 years, and I pay it from my checking account every 2 months throughout the entire year.

As of October 2012, cost of care of the marker was $712.34 (waterline and meter, water usage, plants, and landscaping material). This cost was defrayed by donations amounting to $705.00 from 70 percent of the residents, and money ($123.78) from the 2010 picnic. The account had a positive balance of $116.44 ($828.78 minus $712.34).

Expenditures for the period October 2011 through October 2012 included water usage ($126.72) and plants ($88.76) for a total of $215.48. For a time, the account had a negative balance of $99.04. Donations amounting to $245.00 were received from only 16 of the 62 families (25 percent) in the subdivision. The account was healthy again with a positive balance of $145.96.

Expenditures for the period October 2012 through October 2013 were $230.12 (water usage $372) and plants, fertilizer, hat, pumpkins, etc. $93. Once again, the fund had a negative balance ($84.16). Recent donations from 9 residents totaled $135.00. The current fund balance is $50.84.

Projected costs from now until next October include water ($123.30) and plants in the spring and fall ($90.00–$100.00) or approximately $250.00. Clearly, the present fund balance will not support these costs. Accordingly, contributions are needed. The treasurer for the fund is Joann Fields. Hopefully, every RB family will participate. I sense we all believe that participation provides a measure of the RB community spirit.

Seasons Greetings,

Charles Fields

2 Roaring Brook Court, phone 933–3314, e-mail clfields@earthlink.com.

CASE DOCUMENT 2–1B

Running Brook Marker Fund Needs Your Donations

The Problem

- Our marker maintenance fund currently has a balance of **$50.84**. Our projected maintenance cost this year is $250.00.
- Since 2000, the number of residents contributing has dropped from 70 percent of the residents to only 9 residents. Without contributions, maintenance cannot occur.

How You Can Help

Please contact Joann Fields, treasurer, at 922–3314 or clfields@earthlink.com. Or you can mail her a check, made out to the Running Brook Marker Fund, for $10. This amount will cover the cost of water, plants, and maintenance. Any money left over will be applied to next year's maintenance.

ɔugh October 2012 included
:al of $215.48. For a time, the
tions amounting to $245.00
percent) in the subdivision.
lance of $145.96.
hrough October 2013 were
:r, hat, pumpkins, etc. $93.
.16). Recent donations from
ınce is $50.84.
include water ($123.30) and
or approximately $250.00.
ırt these costs. Accordingly,
fund is Joann Fields. Hope-
all believe that participation

clfields@earthlink.com.

Your Donations

a balance of **$50.84**. Our
.00.
ıting has dropped from
s. Without contributions,

4 or clfields@earthlink.com.
ınning Brook Marker Fund,
r, plants, and maintenance.
maintenance.

Expenditures and Balances to Date			
	Costs	Donations	Account Balance
Oct. 2010	$712.34	$705	$116.44
Oct. 2011	$215.48	$245	$145.96
Oct. 2012	$230.12	$135	$50.84

Information for New Running Brook Residents

Each subdivision in Hot Springs Village has a marker that denotes the entrance to the subdivision. The Property Owners' Associations provide the markers, but residents must maintain and decorate the area surrounding the marker.

A few years ago, we installed a waterline and meter. Water costs have increased, particularly during the summer. Other expenses include plants, fertilizer, hay, and pumpkins.

Keeping our marker area well maintained provides a positive first impression of our neighborhood.

Contact Information—Give us a call if you have questions

Charles and Joann Fields
2 Roaring Brook Court
Hot Springs Village
phone 933–3314, e-mail clfields@earthlink.com

Why is Case Document 2-1B better than Case Document 2-1A? Why would you be more inclined to read and respond to Case Document 2-1B? Charles also decides to paper-clip an empty envelope with his name and address to the request. Why would this decision help Charles achieve his goal?

Case 2-2

The director of online sales at Pine Avenue Books would like to perform a customer survey regarding the store's website in order to improve the efficiency of the online shopping experience. She drafts the following e-mail that she will send to all customers who made online or on-site purchases at the store in the last 2 years (Case Document 2-2A). The store manager, however, tells her that her draft, if sent by e-mail, will likely not be read: (1) The subject line does not encourage busy readers to open the e-mail. (2) The purpose of the message does not appear until the second paragraph. (3) The e-mail as a whole appears dense and difficult for readers to skim. The online sales director decides to revise the original to respond to the three issues.

CASE DOCUMENT 2-2A

SUBJECT: Please take a 5-minute, multiple-choice survey; details follow.

I am the director of online sales at Pine Avenue Books and am conducting a study of the online shopping sections of the store's website. If you have purchased books online in the last 2 years, please consider participating and passing the attached invitation on to your friends for their potential participation.

This study wants to determine how customers view the store's website and, in particular, the sections related to online shopping. Your participation may provide useful information about online shopping and help us to improve your online shopping experience in the future. I am looking for customers who have bought books online at Pine Avenue Books in the last 2 years.

If you participate, your obligations will be low. You will complete a short, anonymous survey via the Internet that will require approximately 5 minutes of your time and will be returned to me via Survey Monkey, an online data collection service. If you complete a survey, your responses will be returned to me anonymously (I will not be able to identify your e-mail address, your IP address, or any other information that would inform me as to your identity or your location). If you agree to do so, you will also participate in a 15- to 20-minute follow-up session (this meeting will occur by telephone or e-mail as you choose). All data for surveys and follow-up interviews will be strictly confidential. Your identity will never be revealed in any results, discussions, or presentation of the research. In addition, all information will be destroyed after I have analyzed the data.

‹s would like to perform a cus-
rder to improve the efficiency
e following e-mail that she will
e purchases at the store in the
ıanager, however, tells her that
1) The subject line does not en-
purpose of the message does
-mail as a whole appears dense
director decides to revise the

ıltiple-choice survey;

Books and am conducting
store's website. If you have
ase consider participating
friends for their potential

view the store's website and,
ng. Your participation may
ıg and help us to improve
am looking for customers
oks in the last 2 years.
You will complete a short,
re approximately 5 minutes
ey Monkey, an online data
responses will be returned
our e-mail address, your IP
orm me as to your identity
also participate in a 15- to
cur by telephone or e-mail
p interviews will be strictly
in any results, discussions,
formation will be destroyed

Completion of the survey and postsurvey interviews is voluntary; you may skip questions and can quit any portion of the study at any time. If you are willing to participate in this study, please click on the following link and complete the survey: http://www.surveymonkey.com/PineAvenueBooks. If you wish to participate in a follow-up interview, please include contact information at the end of the survey.

You may contact me via e-mail (DHS48@packard.com) or phone (512-823-9235)

CASE DOCUMENT 2-2B

SUBJECT: Please take a 5-minute survey about online shopping at Pine Avenue Books.

SURVEY PURPOSE

This study seeks to gauge your opinion of the online shopping sections of the Pine Avenue Books website (www.pineavenuebooks.com). Your participation will help us to improve your future online shopping experience.

If you have purchased books online in the last 2 years, please consider participating and passing the attached invitation on to your friends for their potential participation.

SURVEY REQUIREMENTS

If you participate, your obligations will be minimal.

1. You will complete a short, anonymous survey via the Internet that will require approximately 5 minutes of your time and will be returned to me via Survey Monkey, an online data collection service.
2. If you complete a survey, your responses will be returned to me anonymously. (I will not be able to identify your e-mail address, your IP address, or any other information that would inform me as to your identity or your location.)
3. If you agree to do so, you will also participate in a 15- to 20-minute follow-up session (this meeting will occur by telephone or e-mail as you choose).
4. All data for surveys and follow-up interviews will be strictly confidential. Your identity will never be revealed in any results, discussions, or presentation of the research. In addition, all information will be destroyed after I have analyzed the data.

5. Completion of the survey and follow-up interviews is voluntary; you may skip questions and can quit any portion of the study at any time.
6. If you are willing to participate in this study, please click on the link http://www.surveymonkey.com/PineAvenueBooks and complete the survey. If you wish to participate in a follow-up interview, please include contact information at the end of the survey.

You may contact me via e-mail (DHS48@packard.com) or phone (512-823-9235)

Arranging content. As you collect and begin summarizing information and data, consider how to arrange the material. In what order should you present your content? Memos, for example, need to begin with the news or essential information to ensure that readers at least read what's most important before they start skimming the document or stop reading it altogether. Most reports begin with an introduction, followed by a summary of the report. Alternately, you can combine the introduction with a summary of the report. The discussion section, in which you present the supporting information, follows. Most reports follow some version of this plan. Many business organizations have templates for reports.

You can arrange content by placing material in "stacks," which can be used as a resource when you begin writing. If you know what arrangement you want or have to use, sort material so that you can easily find it when you begin drafting specific segments of your document. You can also sort material electronically: create folders for each segment of your report, then arrange material within each folder before you begin drafting. This method allows you to track material you use and insert appropriate citations when you use material from a specific source.

If you use electronic articles from your library's database, insert these articles into files that can be accessed later when you begin to draft your document.

Drafting. Every individual drafts differently. Most writers work on a document in a start/stop fashion. When you begin your draft, open your file and save it with the name of your report. Then, begin typing ideas or sections. (You may wish to move/paste material you listed, arranged, and then developed in step 2.) You may wish to type the names of your main segments, boldface those, and insert information beneath the appropriate segment. This method helps you keep track of the information that you are using to develop your draft. Note that some of the ideas in your list become headings. Some may be combined with other ideas. You can arrange, delete, and add ideas as you need to.

As you continue to draft, you will revise. But during the drafting stage you should revise only to improve the meaning. Try to avoid worrying about sentences that don't sound "quite right." If the sentence you write captures what you want to say, even clumsily, don't stop to revise. You can "clean up" these sentences later. Don't attempt to correct mechanical problems unless you feel you can do so without slowing your ability to transfer your ideas from your mind to the screen. Focus on presenting your material to your readers; then you can begin a formal revision process once you believe you have your basic ideas on the screen or page.

Revising. During the formal revision process you need to revise several times and focus on different issues:

- **Logic.** Does your presentation make sense? Try reading paragraphs aloud that seem to be "scrambled." Hearing what you have written often tells you if/where problems in logic occur. Does your material occur in the appropriate order for your purpose and for your readers?
- **Completeness.** Does your presentation seem complete, in terms of your purpose and your readers' needs and requirements? Have you checked all your information for correctness? Does your document contain all requested information?
- **Style.** Examine each paragraph and each sentence. Are your paragraphs really paragraphs? Do they have topic sentences? Do all the sentences in the paragraph pertain to the meaning you are building in the paragraph? Start each paragraph with a topic sentence. Eliminate or recast sentences that provide little support for the topic sentence. Today's readers usually dislike wordy, dense, complicated sentences. Make your sentences clear, concise, and precise to encourage your readers to follow your ideas. Also, watch the length of your paragraphs. Long paragraphs discourage readers and tend to become incoherent.
- **Visuals.** Do you need visuals—photos, graphs, drawings, pictorial illustrations—to help your reader "see" and remember key ideas? Visuals combined with text often provide the best means of communicating with your readers.
- **Document design.** When you began drafting, if you used headings or names of report segments to help you organize your draft, you began at that point to design your document. *Document design* refers to the way you arrange information and display it on the page. The importance of how information looks on the page cannot be stressed enough. If you want your writing to be read, design the page so that information is inviting and accessible.

Editing. Get into the habit of performing several "edits" for any document: one for mechanics—spelling, usage, punctuation, and sentence structure.

A second edit focuses on the document as a whole. How does it look? How does it sound? Is the important information easy to locate? Have you included all needed information in the document?

Another edit focuses on citing sources: check your documentation to be sure that you give credit or sources of all information you have used. Be sure that when you use illustrations and ideas from other sources you give credit to the source.

In short, don't try to check for every error at once, in one reading. Editing requires care, objective reading, and diligence.

For an example of how the composing process works when it is applied to a routine business document, read Case 2–3 and track the development of this memorandum. Note how the message looks after Bob's initial revision of his draft.

ɪur documentation to be sure
: have used. Be sure that when
ɔu give credit to the source.
:e, in one reading. Editing re-

works when it is applied to
:rack the development of this
ɔb's initial revision of his draft.

Case 2-3

Bob Johnson, an engineering project manager with a local civil engineering firm, has been named local arrangement chair of the forthcoming construction engineering conference. Two months before the conference, Bob needs to send a memo to everyone in his group to let them know what responsibilities they will have at the conference. While all employees know about the conference, Bob has informed his group via e-mail that each office group will have responsibilities throughout the conference. Bob wants the memo to inform his group specifically about what they will need to do.

Bob uses the planning stage of developing the memo to decide what topics he wants to present to his group. He will send this memo as an e-mail attachment. As he plans his memo, Bob types the following list of topics:

Location, date, time info of conference
Specific duties of the SE Group
General instructions
Conference schedule
Other information SE Group needs to know

As he develops the memo, he inserts information beneath each heading and highlights incomplete sections. He writes notes to himself to allow him to keep track of ideas he may need to add. His first draft looks like this (Case Document 2-3A):

CASE DOCUMENT 2-3A

Bob's First Draft

Conference Location, Date, Time
CE conference—October 28–29—Lancaster Center. Our group's responsibility—serve as greeters, help prevent glitches. Over 150 engineers have already registered, and the cutoff date is still 3 weeks away. We need to be sure we are organized. Conference may be larger than last year. We want to do our part to ensure the success of the meeting. Help all attendees have a good conference. Be proactive in anticipating problems with people getting where they need to be:

Please be at the Lancaster Center at the following times:

Oct. 28: noon–end of the day
Oct. 29: 7:00–end of the conference. Last session begins at 3:30
Refreshments will be available during break periods. WATER IN ALL ROOMS.

Our Responsibilities

Helping visitors locate the section meetings, answer any questions, deal with any hotel reservation glitches, transportation problems, questions about restaurants. Remain available until after the dinner on Oct. 28. Oct. 29: On site throughout the day.

General Instructions Information

- Number expected to register and attend: 200+.
- Visitors will arrive at the hotel by mid-morning on the 28th. Some will come the evening before. [Contact Ralph to see if we need to be at the hotel on Oct. 27 after 5:00? Check information folder for sponsor letters.]
- Be available no later than noon on 28th. If possible, arrive at the Lancaster Center earlier than that. Dress is business casual.
- If those flying in arrive late, contact Jim or Joanna via their cell phones to ensure that registrations are not canceled. Jim: 228–3459; Joanna: 322–1875.

Conference Schedule

Oct. 28

Light lunch: noon–1:15

Opening session: 1:30–3:00

Second session: 3:30–5:00 [check sponsors for all sessions. These have to be correct!!!! Check with central planning group.]

Dinner: 6:30—Holcomb Room, 2nd floor of the LC

Oct. 29

Breakfast: Room 104 of the LC, 7:00–8:00 [sponsor? Be sure we have a complete list with all names spelled correctly. Contact info for each.]

Third session: 8:30–10:00 [session sponsor?]

Closing session: 10:30–noon [sponsor?]

Lunch: noon

Displays

Nine vendors will display software all day the 29th in room 106. Consultants will be on hand to discuss compatibility issues. Be available to help vendors set up.

Conference Materials

Will be available at the check-in desk at the front door.

Each folder will contain brochures about new products and a schedule. Add a list of restaurants downtown?

Other

Breakout rooms will be available for the second part of the sessions.

Phone and faxes are available in Room 110, 8:00–5:00.

Bob's revision follows (Case Document 2-3B). How could he have improved it with the following goals in mind? He wants his employees to

- report on time
- know what they should do when they arrive
- have cell phone numbers for quick contact purposes
- know whom to contact throughout the conference

Does the memo enable Bob's employees to achieve those goals?

CASE DOCUMENT 2-3B

Bob's Revision

TO: SE Group **DATE:** October 1, 2011
FROM: Bob Johnson
SUBJECT: Preparations for the Construction Engineering Conference

Conference Location, Date, Time
The construction engineering conference is scheduled October 28–29 at the Lancaster Center. Our group will serve as greeters. Over 150 engineers have already registered, and we still have 3 weeks before the cutoff date for registration. We need to be sure we are organized to help visitors as they arrive.

Please be at the Lancaster Center at the following times:

Oct. 28: noon–end of the day
Oct. 29: 7:00–end of the conference. Last session begins at 3:30

SE Group—Specific Duties
We will be responsible for helping visitors locate the section meetings, answering any questions, and dealing with any hotel reservation and transportation glitches and will remain available until after the dinner on Oct. 28. Oct. 29—We need to be on site throughout the day and help guests who need to leave promptly at the close of the morning session.

General Information
- Number expected to register and attend: 200+.
- Visitors will arrive at the hotel by mid-morning on the 28th. Some will come the evening before.
- Be available no later than noon. If possible, arrive at the Lancaster Center earlier than that.

If those flying in arrive late, contact Jim or Joanna via their cell phones to ensure that registrations are not canceled. Jim: 228–3459; Joanna: 322–1875.

Conference Schedule

Oct. 28	
Noon–1:15	Light lunch—Mellon Room (Sponsor: KLM Ltd.)
1:30–3:30	Room 105, Opening session
3:30–5:00	Room 105, Second session (Sponsor: Bickle and Lauren)
6:30	Buffet in Holcomb Room, 2nd floor of the LC
Oct. 29	
7:00–8:00	Breakfast: Room 104 of the LC
8:30–10:00	Room 105, Third session (Sponsor: MERK Inc.)
10:30–noon	Room 105 Closing session (Sponsor: Malcolm, Fisher, & Peabody)
Lunch: noon	Mellon Room

Software Displays

Nine vendors will display software all day the 29th in Room 106. Consultants will be on hand to discuss compatibility issues. Be available to help vendors with set-up.

Conference Materials

- Available at the check-in desk at the front door.
- Registration folder with name tags: will contain brochures about new products and a schedule of activities. List of restaurants in town for those who are staying for the weekend.

Other Information

- Phone and faxes are available in Room 110, 8:00–5:00.
- Refreshments will be available during break periods. Bottled water in all rooms.

Call me on my cell phone if anything comes up that isn't covered here.

ɔr: KLM Ltd.)

:: Bickle and Lauren)
of the LC

MERK Inc.)
ır: Malcolm, Fisher, &

.oom 106. Consultants
ılable to help vendors

ochures about new
rants in town for

:00.
ls. Bottled water in all

sn't covered here.

PLANNING AND REVISION CHECKLIST ✔

Analyzing the Situation

- ☐ What is your subject or topic?
- ☐ What is the purpose of the document?
- ☐ Who are your readers, known and potential?
- ☐ Why are you writing? Why is this document required? What is the situation that led to the need for this document? Who cares?

Selecting Content

- ☐ What topics do you need to cover? What do your readers need to know? What do you want your readers to do?
- ☐ What structure do you plan to use? If you have required report sections, what are they?
- ☐ What information resources do you have available? What resources do you need to locate?
- ☐ What types of visuals (e.g., graphs, photos, diagrams) are you considering using? Will they help convey the message?

Arranging Content

- ☐ In what order should the information be placed? What does your reader need to know first?
- ☐ Have you sorted your material into specific groups?
- ☐ Can you see a plan for headings that announce the content to your reader?
- ☐ Does all content have relevance to your purpose?

Drafting

- ☐ Have you inserted information under each of your headings?
- ☐ Have you recorded the sources of all information you will use so that you can develop correct citations after you have completed your draft?
- ☐ Have you noted where you will use graphics? Have you noted the source of each graphic you use from another source?

Revising

- ☐ Have you stated clearly the purpose of your report?
- ☐ Does your content support your purpose?
- ☐ Is your tone appropriate?
- ☐ Will your readers be able to follow your logic?

continued

PLANNING AND REVISION CHECKLIST ✔ *continued*

- ☐ Have you included all required items—report sections and required information?
- ☐ Have you checked all facts and numbers?
- ☐ Could any material be deleted?
- ☐ Is your document easy to read? Are your paragraphs well organized and of a reasonable length?
- ☐ Have you had someone read your draft and suggest improvements?

Editing

- ☐ Have you checked for misspellings and for other mechanical errors, such as misplaced commas, semicolons, colons, and quotation marks?
- ☐ Have you checked all points of the completed draft where your word processing program suggests that you have errors in either sentence structure, mechanics, or spelling?
- ☐ Have you included all the formal elements that your report needs or is required to include?
- ☐ Is your system of documentation complete and accurate (if you are following a style sheet)?
- ☐ Are your pages numbered?
- ☐ Are all graphics placed in the appropriate locations within the text?
- ☐ Is the format consistent—font selected, size, placement of headings?

EXERCISES

1. Phoenix Publishers has always provided free child care to all employees with children ages 3 months to 5 years. For its 50 years of operation, the company has taken great pride in being a family-friendly employer. Tough economic times for the book publishing industry and rising costs of operation for the child-care center, however, now require that the company begin charging parents $100 per month per child for the services of the child-care center. According to the president of the company, it was either that or freeze wages for all employees or lower the already slim dividend paid to the company's stockholders and risk a loss of investors. The president of the company directs you to write three letters regarding this important change: one to parents using the child-care center, one to all employees, and one to the stockholders. Note that parents will also

LIST ✔ continued

tions and required

aphs well organized and

gest improvements?

mechanical errors, such
quotation marks?
raft where your word
ors in either sentence

your report needs or is

accurate (if you are

ons within the text?
cement of headings?

ild care to all employees with
of operation, the company has
ployer. Tough economic times
of operation for the child-care
begin charging parents $100
l-care center. According to the
eeze wages for all employees or
ıpany's stockholders and risk a
directs you to write three let-
ents using the child-care center,
ers. Note that parents will also

receive the letter addressed to employees. Note also that some employees are also stockholders. The president recognizes the sensitivity of this policy change and thus will also expect from you a memo justifying the variations you made in the three letters.

2. Find a blog posting aimed at specialists in your field. Revise the posting for a specific group of readers outside your field who might need to know this information (e.g., business managers, city officials, school administrators). Attach the original to your revision, and submit both to your instructor.

3. Examine Figure 2–1 (addressed to parents) and Figure 2–2 (addressed to employers). What similarities and differences do you notice in the verbal and visual information included? How do the writers adapt information to each audience? What changes, if any, would make the two documents more suitable for their specific audiences?

4. Since Figure 2–2 addresses employers, how would you adapt this information for a message addressed to employees?

Handwashing: A Family Activity
Keeping Kids & Adults Healthy

Handwashing is an easy, inexpensive, and effective way to prevent the spread of germs and keep people healthy.

For kids, washing hands can be a fun and entertaining activity. It is simple enough for even very young children to understand. Handwashing gives children and adults a chance to take an active role in their own health. Once kids learn how to properly wash their hands, they can—and often do—show their parents and siblings and encourage them to wash hands, too.

Parents can help keep their families healthy by:

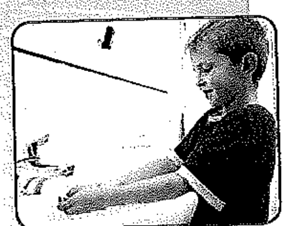
- Teaching them good handwashing technique
- Reminding their kids to wash their hands
- Washing their own hands with their kids

Improving Health

- Handwashing education in the community:
  - » Reduces the number of people who get sick with diarrhea by 31%
  - » Reduces diarrheal illness in people with weakened immune systems by 58%
  - » Reduces respiratory illnesses, like colds, in the general population by 21%

Saving Time and Money

- Handwashing is one of the best ways to avoid getting sick and spreading illness to others.
- Reducing illness increases productivity due to:
  - » Less time spent at the doctor's office
  - » More time spent at work or school



Helping Families Thrive

Children who have been taught handwashing at school bring that knowledge home to parents and siblings. This can help family members get sick less often and miss less work and school.

Despite widespread knowledge of the importance of handwashing, there is still room for improvement. A recent study showed that only 31% of men and 65% of women washed their hands after using a public restroom.

For more details, visit vwww.cdc.gov/handwashing.

CDC Department of Health and Human Services
Centers for Disease Control and Prevention

CS234835-A

FIGURE 2-1 Document for Exercise 3

Source: US Department of Health and Human Services, Centers for Disease Control and Prevention. Handwashing: A Family Activity. Washington, DC: GPO, 2012. http://www.cdc.gov/healthywater/pdf/hygiene/hwfamily.pdf

Handwashing: A Corporate Activity
Improving Health & Increasing Productivity

Handwashing is an easy, inexpensive, and effective way to prevent the spread of germs and keep employees healthy.

Handwashing gives people the opportunity to take an active role in their own health. Most handwashing studies have focused on child care or health care settings. The few that have looked at corporate settings show that promoting clean hands results in fewer employee sick days.

Improving Health

Germs can spread quickly. A healthier community means healthier employees. Handwashing education in the community:

- Reduces the number of people who get sick with diarrhea by 31%
- Reduces diarrheal illness in people with weakened immune systems by 58%
- Reduces respiratory illnesses, like colds, in the general population by 21%

Saving Time and Money

Handwashing is one of the best ways to avoid getting sick and spreading illness to others.

Sick employees are less productive even when they come to work. They may also spread illness to others at work. One recent study promoting clean hands in corporate environments showed:

- Fewer employee illnesses
- Less use of sick days

Helping Families and Workforces Thrive

Employees with healthy children spend less time away from work taking care of sick children, are more productive at work when not dealing with family illness, and get sick less often themselves.

Employers should promote employee handwashing and encourage them to also:

- Teach their children good handwashing technique
- Remind children to wash their hands
- Wash hands with their children

Despite widespread knowledge of the importance of handwashing, there is still room for improvement. A recent study showed that only 31% of men and 65% of women washed their hands after using a public restroom.

For more details, visit www.cdc.gov/handwashing.

CDC Department of Health and Human Services
Centers for Disease Control and Prevention

CS234835-B

FIGURE 2-2 Document for Exercise 3

Source: US Department of Health and Human Services, Centers for Disease Control and Prevention. Handwashing: A Corporate Activity. Washington, DC: GPO, 2012. http://www.cdc.gov/healthywater/pdf/hygiene/hwcorporate.pdf