

Strategies for Effective Business Communication

STRATEGIES FOR EFFECTIVE BUSINESS COMMUNICATION

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PREFACE

The Creation of This Book

This textbook was created as part of the Interactive OER for Dual Enrollment project, facilitated by [LOUIS: The Louisiana Library Network](#) and funded by a \$2 million [Open Textbooks Pilot Program grant from the Department of Education](#).

This project supports the extension of access to high-quality post-secondary opportunities to high school students across Louisiana and beyond by creating materials that can be adopted for dual enrollment environments. Dual enrollment is the opportunity for a student to be enrolled in high school and college at the same time.

The cohort-developed OER course materials are released under a license that permits their free use, reuse, modification and sharing with others. This includes a corresponding course available in [MoodleNet](#) and [Canvas Commons](#) that can be imported to other Learning Management System platforms. For access/questions, contact [Affordable Learning Louisiana](#).

If you are adopting this textbook, we would be glad to know of your use via this [brief survey](#).

Review Statement

This textbook and its accompanying course materials went through at least two review processes:

- Peer reviewers, coordinated by Jared Eusea, River Parish Community College, used an online course development standard rubric for assessing the quality and content of each course to ensure that the courses developed through Interactive OER for Dual Enrollment support online learners in that environment. The evaluation framework reflects a commitment to accessibility and usability for all learners.
 - Reviewers
 - Lisa Abney
 - Esperanza Zenon
 - Missy LaCour
- The Institute for the Study of Knowledge Management in Education (ISKME) collaborated with LOUIS to review course materials and ensure their appropriateness for dual enrollment audiences. Review criteria were drawn from factors that apply across dual enrollment courses and subject areas, such as determining appropriate reading levels, assessing the fit of topics and examples for high school

DE students; applying high-level principles for quality curriculum design, including designing for accessibility, appropriate student knowledge checks, and effective scaffolding of student tasks and prior knowledge requirements, addressing adaptability and open educational practices, and principles related to inclusion and representational social justice.

- Reviewers
 - Elisabeth Cason
 - Sheri Sison

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Jeanne Pavy

About This Textbook

This open textbook has been created as part of the LOUIS OER for Dual Enrollment Project and is shared under a [Creative Commons-Attribution-NonCommercial-ShareAlike 4.0 International License](#).

The five faculty who created this adaptation of *Professional Communications: A Common Approach to Work-place Writing* (Adrienne Abel, Sydney Epps, Veronika Humphries, Sumita Roy, and Joseph Williams) worked together to create the overall learning outcomes and structure of the book, and each person wrote or adapted three of the fifteen chapters. Jeanne Pavy served as the project manager.

We would like to acknowledge the original text that this book is based on:

Professional Communications: A Common Approach to Work-place Writing by Melissa Ashman, Jordan Smith, Brian Dunphy, and Andrew Stracuzzi.

Throughout the adaptation, Canadian references were changed to American references, and American English was substituted for British spelling and phrasing. Broken external and internal links were deleted or replaced. Below are specific chapter-level edits and additions made by the authors of *Strategies for Effective Business Communication*:

Chapter 1 – Sydney Epps

- Minor wording edits
- Added: 5 images and 8 h5p activities

Chapter 2 – Veronika Humphries

- Part of chapter introductory paragraph rewritten
- First paragraph in sections 2.2.1 and 2.2.4
- The title and section 2.2.5 written
- New title of section 2.3 created. Entire table 2.3 featured in section 2.3 rewritten and changed it into paragraph form.
- Added: 5 h5p activities

Chapter 3 – Sumita Roy

- Original content: section 3.2 (Eliminating Bias in Research)
- Wording edits—edited or removed phrases and sections that were irrelevant or unclear
- Added: 1 h5p activity and assignments

Chapter 4 – Sumita Roy

- Original content: section 4.5.2 (Eliminating Bias in Language)
- Wording edits—edited or removed phrases and sections that were irrelevant or unclear
- Replaced table 4.4.2b with a different openly licensed table
- Added: 2 h5p activities, assignments

Chapter 5 – Sydney Epps

- Replaced inactive links with other citations from notable institutions
- Added 1 h5p activity
- Added h5p activity

Chapter 6 – Veronika Humphries

- The chapter introductory paragraph in Section 6.1. written and renamed to “Positive Messages: Information, Requests, and Replies.”
- Renamed Subsection 6.1.1. to “Providing Information.” Removed the last two paragraphs of Section 6.1.2.1. Modified section 6.1.3. Replies to requests.
- Substantially edited section 6.2.2: Replying to Complaints or Claims. Renamed and rewritten subsection 6.2.2 to “Replies to Complaints or Claims” and reworded the second paragraph. Moved subsection 8.2.2.1 to become part of section 6.2.2. The second paragraph in subsection 6.2.2.2, the introductory paragraph in section 6.3, and subsection 6.3.1 were rewritten. Renamed subsection 6.3.2 to “Indirect approach in negative messages” and replaced “bad-news” with “negative” in all subsections.
- Added: 3 visuals; 2 videos; and 4 h5p exercises

Chapter 7 – Sumita Roy

- Original content: section 7.1 (Classical Rhetoric) and 7.2 (Aristotle and the Three Appeals)
- Wording edits – edited or removed phrases and sections that were irrelevant or unclear
- Added: video, 2 h5p activities, assignments

Chapter 8 – Veronika Humphries

- Chapter introductory paragraph written
- Chapter headings and subheadings changed.
- Section 8.1 on email rewritten. Rewritten section 8.1.3 on Subject Line Length. Rewritten opening paragraph and changed title of section 8.1.4 *Opening & Salutation*. Bulleted list in section 8.1.10 rewritten into paragraph form. Added section in 8.1.6.1 on how to set up email signatures in Outlook. Rewritten section 8.1.8 and renamed it Final Revisions.
- Table 8.2.3 rewritten into text format. Updated legislation to reflect United States standards in section 8.2.2 “Legal Responsibilities” and added a paragraph at the end of the section. Rewritten the first paragraph of section 8.2.3 “Using Social Media Professionally” and added a new paragraph at the end. Written new section 8.2.4, “The Dark Side of Technology.” Written new section 8.3.1 “Enterprise Messaging.”
- Added: 4 h5P exercises

Chapter 9 – Adrienne Abel

- Sections 9.1–9.3 from original textbook with minor edits by Adrienne Abel and additional content adapted from various sources, as noted in References
- Chapter headings and subheadings changed
- Added: 4 videos, external links, and 1 h5P exercise (created by Abel)

Chapter 10 – Adrienne Abel

- Sections 10.1–10.3 from original textbook with minor edits by Adrienne Abel and additional content adapted from various sources, as noted in References
- 10.4: adapted from various sources, as noted in References
- Chapter headings and subheadings changed
- Added: 7 videos, external links, and 1 h5P exercise (created by Abel)

Chapter 11 – Adrienne Abel

- Sections 11.1–11.3 from original textbook with minor edits by Adrienne Abel and additional content adapted from various sources, as noted in References
- 10.5: adapted from various sources, as noted in References, with some original content by Abel
- 11.5: Original content (including h5p) by Abel
- Added: 5 videos, external links, 1 image, and 1 h5P exercise (created by Abel)

Chapter 12 – Joseph Williams

- Mostly new content
- Minor wording edits from original text in 12.3 and 12.5
- Added: h5p activity and assignments

Chapter 13 – Joseph Williams

- All new content
- Added: h5p activity and assignments

Chapter 14 – Joseph Williams

- All new content
- Added: h5p activity and assignments

Chapter 15 – Sydney Epps

- Mostly new content
- Expanded information discrimination and harassment, including on #metoo and LGBTQ people
- Minor wording edits from original text in 12.3 and 12.5
- Added: 25p activities and images

INTRODUCTION TO THE TEXT

Veronika Humphries

Strategies for Effective Business Communication

Perhaps at first glance at the title of this textbook, you may think this will be another English writing course. We can reassure everyone that you will not be asked to read Shakespeare and write sentences such as “*The sun was rising upon the horizon when I first opened my eyes...*” or anything similar; however, the book includes a refresher on basic English grammar. Although the course technically falls into the realm of the subjects of English and Communication, the content has one primary aim: to guide you through the process of polishing your professional presence, involving both oral and written communication. This course is one of the most important ones you, as a future professional, will take while preparing for your career. Regardless of the specific career path you choose, you will have to communicate with your supervisors, coworkers, and persons outside your workplace, such as customers or suppliers. The knowledge you acquire through this book will be practical and can last a lifetime. No matter what your place of employment will require, you can be confident that you will be writing emails daily, but you may also be asked to present to a large audience of coworkers or constituents outside of your business. All these tasks will require professional writing and communication skills. Producing any form of output, whether an email, phone call, or feasibility report, will be a reflection of your knowledge and skills to others. Acquiring your dream job or advancing your career may depend on these skills. Often the only thing setting you apart from other applicants at a job interview is your communication skills. Therefore, it is in your best interest to master the material in this book.

The textbook is divided into 15 chapters, gradually building knowledge upon the previous chapters. It begins with the foundations of communications; next, you will learn about the writing process (analyze, draft, revise), which should be used whether you write a two-sentence email to a coworker or a long 200-page report. This writing process sometimes takes 10 seconds, and sometimes it may take months; however, the basic steps remain the same. You will learn about rhetorical theory and discover valuable research techniques, such as how to find credible sources. Persuasive techniques are discussed next, which you will undoubtedly benefit from in your employment but could also use in your everyday life, when asking for a refund, for example. Later you will learn more specific knowledge and techniques to write a professional email, write reports, or give a presentation. The book will also cover helpful and practical information necessary during the employment search process: how to write your résumé and cover letter, what to expect during the employment search process, and what to expect during the job interview. Lastly, you will learn how to communicate in your workplace, within a group, and with people from different cultures and backgrounds, including principles of ethical communication. Again, all this information is very practical and useful and will benefit you for the rest

of your productive years. The added videos and interactive activities will help you check your knowledge at the end of each chapter. Many of these activities include sample documents that require revision, thus providing you with practice exercises similar to real-life scenarios.

To help ensure mastery of the material, the following learning objectives are covered in this textbook:

1. Recognize business situations/issues (both positive & negative) and formulate appropriate responses.
2. Demonstrate an awareness of the rhetorical theory and understand the relationship between audience, purpose, and text.
3. Create professional business/technical documents in appropriate formats using correct grammar and effective style, structure, and visual elements.
4. Deliver professional and polished presentations (in person or virtually) using appropriate style, structure, and visual elements.
5. Demonstrate effective communication and collaboration skills within a group or team.
6. Demonstrate cultural competence in business communication.
7. Discriminate between ethical and unethical communication practices.

CHAPTER 1: COMMUNICATION FOUNDATIONS

Sydney Epps

Chapter Learning Objectives

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



[Group of diverse people having a business meeting](#) by [rawpixel.com](#) is CC0 (public domain)

Let's begin by answering the question that is probably on the mind of anyone enrolled in an introductory English Communications course. Why are you here? It is unlikely you chose this course out of your natural enthusiasm for English classes. It's because it is a requirement to advance in the program and graduate.

So why would the program administrators require you to take this course? You need sharp communication skills to be able to apply the core skills you are learning in your other courses in the program. This textbook's first section expands on this so that you can proceed through this course in the right frame of mind. None of your courses make sense unless you realize that communications skills are a necessary key to thriving in this global environment, particularly through economic volatility.

- [1.1: Why Communications?](#)
- [1.2: Communicating in the Digital Age](#)
- [1.3: The Communication Process](#)
- [1.4: Troubleshooting Miscommunication](#)

1.1: Why Communications?

Section 1.1 Learning Objectives



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

- [1.1.1: Communications vs. English Courses](#)
- [1.1.2: Communication Skills Desired by Employers](#)
- [1.1.3: A Diverse Skill Set Featuring Communications Is Key to Survival](#)
- [1.1.4: Communication Represents You and Your Employer](#)

1.1.1: Communications vs. English Courses

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

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

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

A course in Communications brings your existing communication skills up to a professional level by

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

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

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

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

Key Takeaway



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

Exercise



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

1.1.2: Communication Skills Desired by Employers

Section 1.1.2 Learning Objectives



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

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

In an annual [Graduate Management Admission Council™](#) Corporate Recruiters Survey of the skills candidates need to enter and grow in the 21st-century workplace, “[c]ommunication skills topped the list,

followed in order by teamwork skills, technical skills, leadership skills, and managerial skills” (GMAC Research Team, 2020). Employers specifically want employees to know how to:

- Read and understand information presented in a variety of forms (e.g., words, graphs, charts, diagrams)
- Write, speak, and present content in a way that compels audiences to pay attention and understand new information
- Listen and ask questions to understand and appreciate the points of view of others
- Share information using a range of information and communications technologies (e.g., voice, email, computers)
- Use relevant scientific, technological, and mathematical knowledge and skills to explain or clarify ideas (e.g., a conference presentation or trifold or a non-disclosure agreement)

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

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

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

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

The latest thinking in human resources (HR), however, is that both of those traditional filters are unreliable; applicants can use outside resources to strengthen their documents without learning the critical skills discussed in this book. You could get someone else to write your résumé and cover letter for you, or you may follow a template and replace someone else’s details with your own. Though most job competitions for well-paying jobs will yield exceptionally good and bad résumés and cover letters amid a tall stack of applications, most

tend to look the same because most applicants follow fairly consistent advice about how to put them together. Likewise, you can train for an interview and “fake it to make it” (Cuddy, 2012), then go back to being your less hireable self in the workplace, only to be the first one “let go” during departmental changes or re-organizations.

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

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

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

Key Takeaway



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

Exercises



1. Go to the U.S. Bureau of Labor Statistics site and find your chosen profession (i.e., the job your program will lead to) via the [Occupation Finder](#) page. List the particular document types you will be responsible for communicating with in a professional capacity by reading closely through the drop-downs.
2. Prepare a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis of your current communication norms by interviewing 2–3 close friends, relatives, and academic peers about their perceptions of you.

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1.1.3: A Diverse Skill Set Featuring Communications Is Key to Survival

Section 1.1.3 Learning Objectives



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

The picture painted by this insight into what employers are looking for tells us plenty about what we must do about our skill set to have a fighting chance in the fierce competition for jobs: diversify it and keep our communication skills at a high level. Gone are the days when someone would do one or two jobs throughout their entire career. According to a U.S. Bureau of Labor Statistics National Longitudinal Survey of Youth 1979—which tracks the lives of workers from the baby boomer generation (“individuals born from 1957 to 1964,” p. 1)—the retiring generation held an average of 12 jobs in their careers (BLS, 2021); with new technologies changing the future of office and time-dependent paid opportunities for employment (like Lyft and Uber for taxi and shuttle services), new opportunities may involve gigging for several employers at once rather than for one (Mahdawi, 2017).

Futurists tell us that the “gig economy” will evolve alongside advances in AI (artificial intelligence) and automation that will phase out jobs of a routine and mechanical nature with machines. On the bright side, jobs that require advanced communication skills will still be safe for humans because AI and robotics cannot so easily imitate them in a way that meets human needs. Taxi drivers, for instance, are a threatened species now with Uber encroaching on their territory and will certainly go extinct when the promised driverless car revolution arrives in the next 10-15 years, along with truckers, bus drivers, and dozens of other auto- and

transport-industry roles (Frey, 2016). They can resist, but the market will ultimately force them into retraining and finding work that is hopefully more future-proof—work that prioritizes the human element.

Indeed, current predictions from an HSBC Global Research study note that positions such as administrative assistants and groundskeepers are at high risk of being affected by automation by the mid-2020s to 2030s (Fanusie, 2021). Some of those will be eliminated outright, but most will be redefined by requiring new skill sets that cannot be automated so easily. The 36% of jobs at low risk are those that require either advanced soft skills and emotional intelligence featured in roles such as managers, nurses, and teachers (Lamb, 2016), creativity, or advanced STEM skills in developing and servicing those technologies (Mahdawi, 2017; Riddell, 2017).

Read more: [The Future of Jobs Report 2020](#) from the World Economic Forum

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

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

Exercises



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

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

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1.1.4: Communication Represents You and Your Employer

Section 1.1.4 Learning Objectives



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

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

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

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

As the marketing slogan goes, you do not get a second chance to make a first impression. If potential employers or clients (who are, essentially, your employers) see that you care enough about details to write a flawless email, they will jump to the conclusion that you will be as conscientious in your job and are thus a safe bet for hire. Again, it's no guarantee of future success, but it increases your chances immeasurably. As Wiens says of the job of coding in the business of software programming, “Details are everything. I hire people who care about those details” (§12–13), but you could substitute “programmer” with any job title and it would be just as true.

Key Takeaway



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

Exercise



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

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1.2: Communicating in the Digital Age

Section 1.2 Learning Objectives



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

7. Select and use common, basic information technology tools to support communication.

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

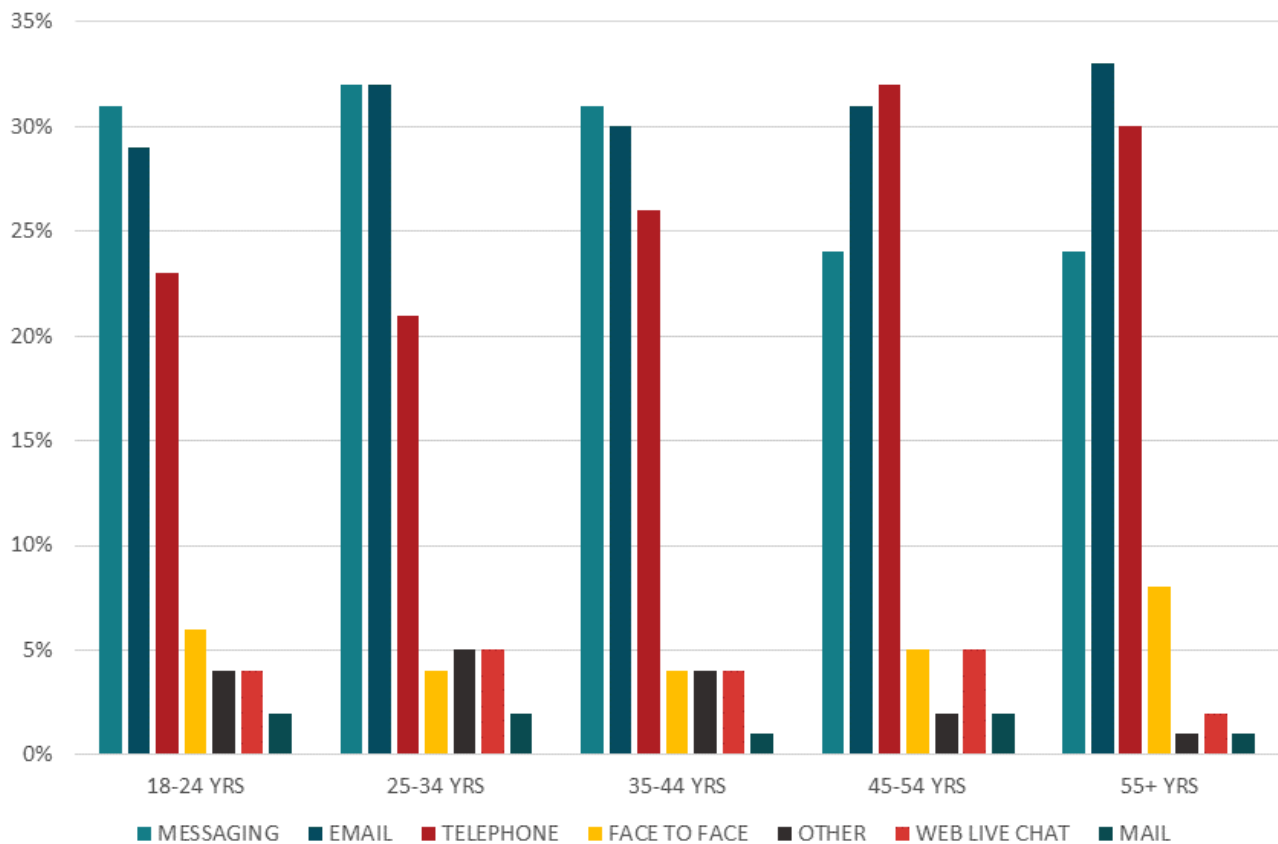


Group of diverse people using smartphones by rawpixel.com is CCO (public domain)

Where being overly comfortable with texting becomes a disadvantage, however, is when it is used as a way of avoiding the in-person, face-to-face communication that is vital to the routine functioning of any organization. As uncomfortable as it may sometimes be, especially for teens in their “cringey awkward years,” developing conversational skills throughout that decade is hugely important by the time they enter a workforce mostly populated by older generations who grew up without smartphones, developed those advanced conversational skills the hard way by making mistakes and learning from

them, and expect well-developed conversational skills of younger generations entering the workforce. Though plenty of business is done online these days, there really is no good substitute for face-to-face interaction.

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



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

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

Customer service aside, face-to-face interactions are still vitally important to the functioning of any organization. In a study on the effectiveness of in-person requests for donations versus requests by email, for instance, the in-person approach was found to be 34 times more successful (Bohns, 2017). We instinctively value human over machine interaction in many (but not all) situations we find ourselves. Though some jobs like nurse or therapist simply cannot function without in-person interaction and would be the last to be automated (if ever), most others will involve a mix of written and face-to-face communication. During the COVID-19 pandemic, for instance, eHealth, telehealth, and/or telemedicine solutions assisted with face-to-face communication in delivering health care services to patients living with chronic diseases/conditions. While physical distancing emerged as the most effective way to reduce spread of COVID-19, Bitar and Alismail (2021) noted the value “of using such technological solutions in the future when the COVID-19 crisis is over” in circumstances where physical and transportation limitations may continue (p. 16).

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



Coworkers at lunch with phones by [rawpixel.com](https://www.rawpixel.com) is CC0 (public domain)

Those advantages are double-edged swords, however, so it is important that we manage the risks associated with them. With so much mobile technology enabling us to communicate and work on the go, from home, or anywhere in the world with a Wi-Fi connection, we are expected to be always available to work, to always be “on”—even after hours, on weekends, and on vacation—lest we lose a client to someone else who is available at those times. The early bird gets the worm. Add to that the psychological and physiological impacts of adults averaging 8.8 hours of screen time per day (Dunckley, 2014; Twenge, 2017; Nielsen, 2016, p. 4). With this number increasing, it’s no wonder that problematic technology use, including screen addiction, is a growing concern among both health and technology experts (Phillips, 2015; Fawcett, 2019). Beyond being an effective communicator and professional in general, just being an effective *person*—in the sense of being physically and mentally healthy—requires knowing when *not* to use technology.

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

All such technology will change rapidly in our lifetimes, some will disappear completely, and new devices

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

Key Takeaway



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

Exercises



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

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1.3: The Communication Process

Section 1.3 Learning Objectives



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

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

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

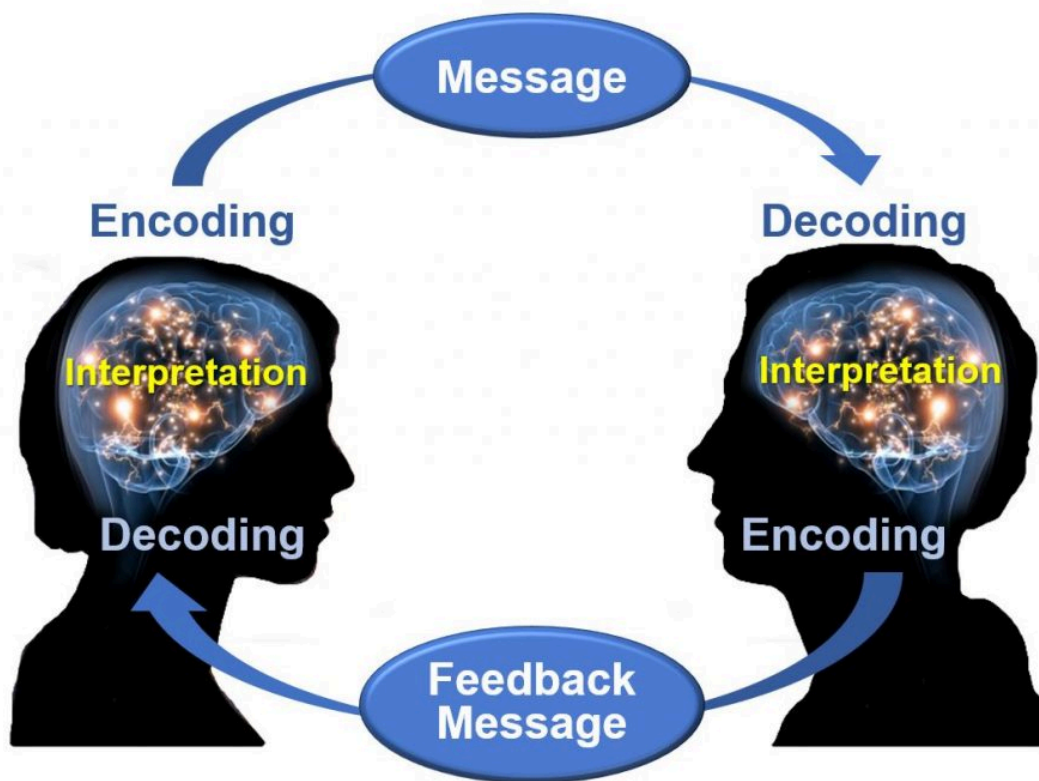


Figure 1.3: The Osgood-Schramm model of communication.
Sources: [Kisspng, 2018](#); [Web Editor 4, 2017](#)

According to the Osgood-Schramm model of communication (1954), you first **encode** an idea into a **message** when you want to communicate that idea with the outside world (or even just to yourself). If you choose to send that message in the **channel** of in-person speech (as opposed to other spoken, written, or visual channels, examples of which are listed in Table 1), you first form the word into the language in which you will be understood, then send electrical impulses to your lungs to push air past your vocal chords, send electrical impulses to vibrate your vocal chords to bend the air into a sound, shape those sound waves further with your

jaw, tongue, and lips, send that sound on its way through the air till it reaches the eardrum of the **receiver**, which vibrates in a manner that tickles the cochlear cilia in their inner ear, which sends a patterned electrical impulse into their brain, which proceeds to **decode** that impulse into the same pattern of electrical impulses that constitute the same idea that you had in your brain.

Table 1.3: Examples of Communication Channels

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

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

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

As you can see, this whole process is easier done than said because you encode incredible masses of data to transmit to others all day long in multiple channels, often at once, and are likewise bombarded with a constant multi-channel stream of information in each of your five senses that you decode without being even consciously aware of this complex process. You just do it. Even when you merely talk to someone in person, you’re communicating not just the words you’re voicing but also through your tone of voice, volume,

speed, facial expressions, eye contact, posture, hand movements, style of dress, etc. All such channels convey information besides the words themselves, which, if they were extracted into a transcript of words on a page or screen, communicate relatively little. In professional situations, especially in important ones such as job interviews or meetings with clients where your success depends entirely on how well you communicate across the verbal and all the nonverbal channels, it's extremely important that you be in complete control of all of them and present yourself as a detail-oriented *pro*—one they can trust to get the job done perfectly for their money.

Key Takeaway



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

Exercises



1. Without looking at the communication process model above, illustrate your own theory of how communication works and label the diagram's parts. Compare it to the model above and discuss the advantages and disadvantages of each.
2. Table 1.3 above compiles only a partial list of channels for verbal, written, and visual channels. Extend that list as far as you can push it.

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1.4: Troubleshooting Miscommunication

Section 1.4 Learning Objectives



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

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

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

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

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

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

1.4.1: Sender-related Miscommunication

The responsibility of the sender of a message is to make it as easy as possible to understand the intended meaning. If work must be done to get your point across, it is on you as the sender to do all you can to make that happen. (The receiver also has their responsibilities that we’ll examine below, but listening and reading are not necessarily as labor-intensive as composing a message in either speech or writing.) This is why grammar, punctuation, and even document design in written materials—as well as excellent conversational and presentation skills—are so important: sender errors in these aspects of communication lead to readers’ and

audiences' confusion and frustration, which get in the way of their understanding the meaning you intended. If senders of messages fail to anticipate their audience's needs and miss the target of writing or saying the right thing in the right way to get their messages across, they bear the responsibility for miscommunication and need to pay close attention to the lessons throughout this textbook to help them get back on target.

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

- Ensure that they can properly hear you by projecting your voice so that even the people in the back row can hear you properly; check that they can by asking if they can hear you just fine. Use a microphone if one is available, even if no one acknowledges an inability to hear; those who are hard of hearing may not want to identify themselves as such. In addition, using a microphone will assist in video and audio recording.
- Get them involved and engaged by asking for a show of hands on topical questions.
- Ask them to ask questions if they do not understand anything; make them feel at ease to ask questions by saying that there are no stupid questions and that if a question occurs to any one of them, it is probably also occurring to the rest.
- Flag important points and, several minutes later, ask them to summarize them back to you when you are relating them to another major point.

1.4.2: Channel-related Miscommunication

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



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1.4.3: Receiver-related Miscommunication

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



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Say you arrive at the lunch spot with your manager and sit down to eat, but it’s too noisy to hear each other well; you would be equally foolish to use this environmental problem as an excuse not to talk and instead just browse your social media accounts on your phone (perhaps your usual lunchtime routine when eating solo) in front of her. You could accommodate her need to hear you by raising your voice, but the image of you shouting at your manager also sends all the wrong messages. Rather, if you cite the competing noise as a reason to move to a quieter spot where you can converse with her in a way that displays the polish of your manners and ultimately positions you nicely for the promotion, she would understand that you have the social intelligence to control the environmental conditions in ways that prioritize effective communication.

Of course, so much more can go wrong with the receiver. In general, the receiver may lack the knowledge

to understand your message; if this is because you failed to accommodate their situation—say you used formal language and big, fancy words but they do not understand because they are ESL (English as a Second Language)—then the blame shifts back to you because you can do something about it. You could instead use more plain, easy-to-understand language. If your audience is a coworker who should know what you’re talking about when you use the jargon of your profession, but they do not because they’re in the wrong position and in over their head, the problem is with the receiver (and perhaps the hiring process).

Another receiver problem may have to do with attitude. If a student, for instance, believes that they do not need to take a class in Communications because they speak the language, think their high school English classes were a complete joke, and figure they will traverse workplace communication on their own, then the problem with this receiver is that overconfidence prevents them from keeping the open mind necessary to learn and take direction. Carried into the workplace, such arrogance would prevent them from actively listening to customers and managers, and they would most likely fail until they develop necessary active listening skills (see below). Employers like employees who can solve problems on their own; those who are unable to take direction can cause costly problems between staff members and clients, resulting in strained relationships, poor morale, and lost business.

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

Key Takeaway



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

Exercise



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

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Test Your Understanding



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1.5: Listening Effectively

Section 1.5 Learning Objectives



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

If most communication is text-based, why is it still important to be an effective listener? Why not just wait till

everyone who's grown up avoiding in-person contact in favor of filtering all social interaction through their smartphones dominate the workforce so that conversation can be done away with at last?

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

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

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

With so much of the communication process's success riding on the responsibility of the receiver to understand both explicit and implicit messages, effective, active listening skills are keys to success in any business.

1.5.1: Receiver Errors

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

- A poor reader of nonverbal social cues due to a lack of experience in developing conversational skills
- Distracted by their devices
- Experiencing too much internal “semantic noise” interference from their minds wandering off topic with distracting thoughts about non-work-related things even during work communication

- Too preoccupied rehearsing what they're going to say on a topic because they would rather speak than listen, or they listen only to reply rather than to understand
- Trying to multitask by reading or browsing while listening, but doing neither very effectively (Sanbonmatsu et al., 2013)



[Woman playing on her phone at work](#) by [rawpixel.com](#) is CC0 (public domain)

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

1.5.2: Be an Active Listener



[Business people in a meeting](#) by [rawpixel.com](#) is CC0 (public domain)

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

Rather, maintain strong eye contact with the speaker to show active interest. Resist the social anxiety-driven

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

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



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

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

If you spent too much of your youth lost in screen time rather than interacting in person with friends, however, there's no time like now and the rest of your life to begin favoring human contact over technology. Of course, the technology will always be there and you will be great at using it when the situation calls for it. However, your professional and personal well-being depends on knowing how and when to do without it and

to get back to what really matters: being human. From there, professional success follows from keeping the communication channels open to solve problems collaboratively one conversation at a time.

Key Takeaway



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

Exercises



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

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Test Your Understanding



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CHAPTER 2: AUDIENCE

Veronika Humphries

Chapter Learning Objectives

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

2.1: Analyzing Your Audience

- [2.1: Analyzing Your Audience](#)
- [2.2: Message Channel Selection](#)

Section 2.1 Learning Objectives



1. Analyze primary and secondary audiences using common profiling techniques.
2. Identify techniques for adjusting writing style according to audience size, position relative to you, knowledge of your topic, and demographic.

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

Just as the first commandment in any business is “Know your customer,” so the first in communication is “Know your audience.” Similarly, as a business strives to please and meet its customer’s demands, a writer must tailor their message to meet the receiver’s needs and expectations. The term audience may include individuals that you as the writer are familiar with but it could also include persons that you have never met before. That is why it is so important to analyze your audience before writing a message. An analysis is important even if the message you are about to send is a short email that may seem unimportant. Analyzing your audience is especially important if you are writing to them for the first time. You must adjust the content, tone, and style of your message appropriately based on your recipient’s background, knowledge about the topic, position, and rank within or outside the organization. You wouldn’t speak to a customer approaching you for the first time the same way you would a co-worker who is also your friend, nor would you speak to your manager the same way you would speak to either of the others (depending on what type of manager you have). In each case, you adjust the level of detail in your content, as well as your tone, word choices (diction), grammar, and overall style (formal or casual) based on how you’ve profiled your audience.

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

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

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

2.1.1: Writing for Audiences of Various Sizes

2.1.2: Secondary Audiences

2.1.3: Considering Your Relationship to the Audience and Their Position

2.1.4: Considering Your Audience’s Level of Knowledge

2.1.5: Audience Demographics

2.1.1: Writing for Audiences of Various Sizes

Writing to one person is a relatively straightforward task, but you must adjust your writing style to accommodate a larger audience. When emailing one person, for instance, you can address the recipients by name in the opening salutation and continue to use the second person singular “*you*” throughout the rest of your message. Two or three recipients should be individually addressed but past four, you may start to use collective salutations such as “Hello, team,” or “Hi, all.” For a small audience, your style can generally follow the conversational rapport you’ve developed with them, whether that be formal or informal, humorless or humorous, literal or expressive, and so on.

The larger the group, however, the more general and accessible your language has to be. When writing for an indeterminately large group such as the consumer public (a blog on your company’s website), your language must be as plain and accessible as possible. In the United States, the public includes readers who will appreciate that you use simple words rather than big, fancy equivalents because English may be their second or third language.

Use familiar language, known as expressions and illustrations:

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

The larger the group, the more careful you must be with using unique English idioms. Idioms are quirky or funny expressions we use to make a point. For example, if you wanted to reassure a customer who recently immigrated from North Africa, explaining an automotive maintenance procedure unique to winter weather in Maine and saying, “*Hey, don’t worry, it’ll be a piece of cake,*” they may be wondering what eating cake has to do with switching to winter tires. Likewise, if you said that it’ll be “*a walk in the park,*” they would be confused about why they need to walk through a park to get their radials switched. Calling it a “cakewalk” wouldn’t help much, either. These expressions would be perfectly understood by anyone who has been conversing in English

for years because they would have heard them many times before and used them themselves. In the case of using them around ESL (English as a second language) speakers, however, you would be better off using the one word that these idioms translate to, which is the word “easy”. Again, the whole goal of communication is to be understood, so if you use idioms with people who haven’t yet learned them, you will fail to reach that goal. See [The Idioms](#) for a wide selection of English idioms and their meanings.

2.1.2: Secondary Audiences

Always consider secondary or even tertiary audiences for any message you send. Although secondary audiences you may have included in your message are designated as recipients, you have little-to-no control over what tertiary audiences see your message. Your emails can be forwarded, your text or voicemail messages shown or played, and even the words alone can simply be reported to tertiary audiences. Youth who are more comfortable writing electronically than speaking in person often make the mistake of assuming privacy when sending messages and get burned when those messages fall into the wrong hands—sometimes with surprising legal consequences related to bullying or worse. Before sending that email or text, or leaving a voicemail in professional situations, however, always consider how your manager, your family, or a jury would perceive the conversation.

You may think that you have a right to privacy in communication, and you do to some extent, but employers also have certain rights to monitor their employees and ensure company property (including cyber property) isn’t being misused (Lublin, 2012, ¶14). A disgruntled employee, for instance, uses their company email account in communication with a rival company to prove that they are part of a target company. The same employee later uses that email account to sell trade secrets before leaving for another job. The employer has a right to read both of these emails and take measures to protect against such corporate espionage. Because company emails can be stored on the organization’s servers, always assume that any email you send using a company account can be retrieved and read by tertiary audiences (such as auditors or law enforcement). If you are at all concerned that an email might hurt you if it fell into the wrong hands, arrange to talk to the primary audience on a channel that won’t be so easily monitored.

Even in more harmless and routine information sharing, you must adjust your message for any known or unknown secondary audiences. If you copy your supervisor or other stakeholders in your email, you will be even more careful to avoid any mistakes, since a poorly written message is a direct reflection of you. Your style will be a little more formal and you will proofread more thoroughly to avoid writing errors that make you appear uneducated and sloppy, which no employer wants to pay for.

Even if you don’t designate other recipients, as explained above, someone else could. For example, you might be in a back-and-forth email thread with a co-worker as you collaborate on a project. You’re making good progress at first, but your partner begins slacking off and your emails become progressively impatient, even angry and threatening. Frustrated, you enlist another collaborator who, towards the end of the thread as drafts are exchanged with finishing touches, copies your manager to show that the work is completed. Seeing the lack

of professionalism in your exchanges with the previous collaborator when trying to assess what discipline may be necessary, your manager now sees that you must share some of the blame for your poor communication choices.

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

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2.1.3: Considering Your Relationship to the Audience and Their Position

Just as you might wear your best clothes for an important occasion such as a job interview or wedding, you must respectfully elevate the formality of your language depending on the perceived importance of the person you're communicating with. As said above, if you're writing to your manager about something very important, something that will be read closely perhaps by many people, you would be more careful to write in a professional style and fully proofread your email than you would if you were writing a co-worker who doesn't really care about the odd spelling mistake. Employers or clients will create their personal judgment based on your writing and can deem you careless if they receive a poorly written email from you. Employers prefer detail-oriented and precise employees, which includes products of writing because they represent the company to customers and other stakeholders (Wiens, 2012). Ultimately, you don't want to embarrass yourself and lose a chance on professional opportunities with glaring writing mistakes that more thorough proofreading could have caught.

Formality in writing requires correct grammar, and punctuation, and it involves carefully selecting words that are more professional than the colloquial ("informal") words you would normally use in everyday situations. Word choice or diction requires that you use a thesaurus to find words with meanings equivalent to the simpler words that come to mind (called "synonyms"), then always use a dictionary to ensure that the

synonym is the correct choice in the context you're using it. When writing to a relatively non-judgmental co-worker whom you've become good friends with, you tend to write more casually with plain words that are possibly even slightly slangy for comic effect. When writing someone higher up in your organization's hierarchy, however, you would probably choose skillfully selected words along the formality spectrum, yet not so fancy as to come off as pretentious and trying to make them feel unintelligent by forcing them to look at the words in the dictionary. Such obfuscation wouldn't be reader-friendly and accomplish the basic communication goal of being understood, as you might realize right now if you don't know what the word obfuscation means (it means the act of intentionally making your meaning unclear to confuse your audience).

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

Table 2.1.3: Word Choices along the Formality Spectrum

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

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2.1.4: Considering Your Audience's Level of Knowledge

A key step when analyzing your audience is to think about how much the recipient of your message already knows about the topic you are about to discuss. Your goal is to provide ample explanation so that the receiver will not have any additional clarifying questions. On the other hand, you do not want to restate so much information that the reader already knows. A safe assumption with everyone you deal with in professional situations is that they're busy and don't have time to read any more than they need to. If you overexplain a topic in an email, you make the double mistake of wasting the reader's time and insulting them by presuming their ignorance. Additionally, this becomes a triple mistake considering the time you wasted in writing more than you had to.

On the other end of that spectrum, it is also an inconvenience to not provide enough information. A lack of necessary information in a message ultimately leads to either errors due to confusion or wasted time from having to respond with requests for clarification or, worse, damage control because your reader acted on misunderstandings resulting from your miscommunication. Either way, the goal of communication (for the receiver to understand information as it was understood by the sender) isn't met by the message.

Appropriately assessing your audience's level of knowledge extends to the language you use. Every profession has its jargon, which is the specialized vocabulary, shorthand code words, and slang that you use amongst colleagues with the same discipline-specific education as you. Jargon saves time by making elaborate descriptions unnecessary, so it's useful among people who speak the same language. But some professionals err by using jargon with customers and even employers who don't know the lingo. At worst, this puts those audiences in the uncomfortable position of feeling ignorant of something perhaps they should know about, leading to confusion; at best it leads to opportunities for educating those audiences so they can use the same jargon with you.

Effective document design can also aid in understanding for those who may have difficulty with reading comprehension, as well as for those who are competent professionals but are just busy. When explaining a procedure, for instance, using a numbered list rather than a paragraph description helps the reader skim to find their spot when going back and forth between your instructions and performing the procedure itself.

Brief, bolded headings and subheadings for discreet topics within a document also orient readers looking for specific information, as you can see from scanning through this textbook. If this chapter contained no such headings and instead was just a ream of paragraphs as in a novel, finding this section using the Table of Contents and index alone would probably double or triple the time it takes to narrow down where it begins and ends.

2.1.5: Audience Demographics

It is also necessary to adjust your message based on your audience's level of education, age group, or profession,

as described earlier. Depending on your profession, you may have to deal with people of all ages and levels of education from elementary school children to retirees.

Sometimes judging levels of understanding can be difficult and lead to trouble when done in error, so tact and emotional intelligence are essential. It can be downright insulting if you speak to an elderly person as you would to a child because you assume that their coherence is diminished when in fact the opposite is true. Don't be surprised if your condescension is met with a sassy kickback if you make that mistake. But if you speak to an elderly person as you would a middle-aged adult despite their having severe hearing loss and undiagnosed early-onset dementia, this will also lead to failures in communication and understanding. So, what are we to do, then?

The key to determining the level of one's understanding is always to begin communication with a mid-level diction and conversational tone in your opening message, then adjust based on the feedback message, which includes both a verbal or written response and nonverbal clues (if communicating in person). In-person, nonverbal feedback such as a briefly furrowed brow of confusion helps to determine if a message is misunderstood. A slight eye-roll subtly informs you that you've started off too basic and need to step up to a more advanced level. Sometimes you can even "see" these expressions in writing by reading between the lines of a response that indicates a more advanced understanding than you assumed.

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

- Extremely intelligent but English is their second or third language and they're still in the process of learning it
- Extremely intelligent at some things but just not at writing
- Very young and still learning how to write
- Elderly and either out of practice or losing their faculties
- Affected by any number of learning disabilities of varying severity
- Good writers and smart, but in a terrible rush

Make sure to avoid reaching conclusions. Rather, respond without judgment to someone who writes poorly, but do so in a plain, accessible style using familiar words and fully explaining your topic.

Being nonjudgmental as well as respectful towards those of different cultures and religious beliefs is also key to effective communication. If you are committed to a belief system yourself, never assume that everyone else shares your views or is wrong for believing otherwise. Even if you are not religious per se, you still have a belief system shaped by the culture in which you developed. Everyone's belief system is the result of life experiences that differ from those of others; unless that system drives them towards anti-social behavior or even

violence, nothing is wrong with holding those beliefs as far as you're concerned. In your writing, always be understanding towards others' beliefs; don't belittle or insult them.

Key Takeaway



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

Exercises



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

2.2: Message Channel Selection

Section 2.2 Learning Objectives



1. Distinguish between communication channels to determine which is most appropriate for particular situations.
2. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

2.2.1: Common Workplace Communication Channels

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

Addressing sensitive situations exclusively by email (or, even worse, text message) tends only to intensify a conflict. Email or messaging can't possibly address the emotional complexity of a difficult situation and usually results in costly delays given the time lag between responses. Tensions also tend to escalate when people have the time to read too much into emails and text or instant messages about sensitive topics, misinterpret their tone, and write angry or passive-aggressive ones in return. (Many people tend to lack filters when writing electronically in a state of heightened emotion because they feel relatively free to express the internal monologue that they would otherwise restrain if in the physical company of the person they're writing to.) Email is only one of many channel options and although the most popular and widely used one, always consider other options before making the decision on how to address your audience most effectively and efficiently.

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

understood as intended (the goal of communication), and one that is lost in the noise or misunderstood in costly ways.

2.2.1: Common Workplace Communication Channels

The following is a list of communication channels from the richest to the poorest in terms of feedback. In-person communication provides the richest feedback because you see the person you are communicating with and speak to them in real-time (without any delays in responses). You can see their facial expressions, their body language, and hear their tone of voice, which gives you the opportunity to adjust your message appropriately based on what you see and hear. A report provides the poorest feedback because you cannot see the person's reactions while reading it. If it is a long report, it may take a long time before you receive any response and therefore it is impossible to adjust your communication in any way after the report has already been submitted.

- [In-person conversation and group meeting](#)
- [Video chat and web conference](#)
- [Phone, VoIP, voicemail, and conference calls](#)
- [Email](#)
- [Instant/text message](#)
- [Instagram](#)
- [Memo](#)
- [Letter](#)
- [Report/PowerPoint](#)

Channel: In-person conversation and group meeting

Advantages: It is the most information-rich channel combining words and nonverbal messages; facilitates immediate back-and-forth exchange of ideas; maintains the human element lacking in most other channels, and additional participants can join for group discussion.

Disadvantages: The speakers must be physically in the same space together; people have different levels of verbal communication and listening skills; the results of the conversation are not permanent unless recording equipment is used.

Expectations: The audience must be present and attentive rather than distracted by their mobile technology or multitasking; a dynamic speaking ability is required to engage audiences.

Appropriate Use: Quickly exchange ideas with people close by; visually communicate to complement your words; add the human element in discussing sensitive or confidential topics that need to be worked out through dialogue.

Channel: Video chat and web conference

Advantages: Enables face-to-face, one-on-one, or group meetings for people physically distant from one

another (anywhere from across town to the other side of the planet); allows participants to see non-verbals that would be unseen in a phone conference meeting; can be integrated into a real in-person meeting to include physically absent members; inexpensive with common applications such as Zoom, Skype, FaceTime (for Apple devices), and Google Talk; more cost-effective than flying people around to conduct routine meetings.

Disadvantages: Connection problems often result in poor audio quality (cutting in and out) and split-second delays that result in misleading nonverbal cues and participants talking over one another; enterprise applications improve functionality but for a higher cost.

Expectations: Requires a high-speed internet connection, microphone, and webcam all in good working order; requires that participants be as present and presentable (at least from the waist-up) as they would be for an in-person meeting; participants must control their background surroundings, especially when web conferencing from home, to avoid interruptions.

Appropriate Use: Ideal when in-person meetings are necessary but participants are in different physical locations; often used for job interviews when participants cannot conveniently attend in person.

Channel: Phone, VoIP, voicemail, and conference calls

Advantages: Enables audio-only dialogue between speakers anywhere in the world; quick back-and-forth saves time compared to written dialogue by email or text; can send one-way voicemail messages or leave them when the recipient isn't available; can be conducted cheaply over the internet (with Voice over Internet Protocol) and easily on smartphones; specialized phone equipment and VoIP enable conference calls among multiple users.

Disadvantages: Absence of nonverbal visual cues can make dialogue occasionally difficult; the receiver of a call isn't always available, so the timing must be right on both ends; if not, availability problems lead to "phone tag"; time zone differences complicate the timing of long-distance calls; possibly expensive for long-distance calls over a public switched telephone network (PSTN) if VoIP isn't available; limited length of the voicemail message; recording of conversations is typically unavailable unless you have special equipment.

Expectations: Follow conventions for initiating and ending audio-only conversation; for voicemail, strike a balance between brevity and providing a thorough description of the reason for the call and your contact information; record a professional call-back message for voicemail when not available to take a call; respond to voicemail as soon as possible since you were called with the hope that you would be available to talk immediately; be careful with confidential information over the phone, and don't discuss confidential information via voicemail.

Appropriate Use: When quick dialogue is necessary between speakers physically distant from one another; use conference call when members of a team can't be physically present for a meeting; use VoIP to avoid long-distance charges; leave clear voicemail messages when receivers aren't available, when a record of the conversation isn't necessary, or when confidentiality is somewhat important.

Channel: Email

Advantages: Delivers messages instantly anywhere in the world to anyone with an internet connection and email address; can be sent to one or many people at once, including secondary audiences CC'd (copied) or

BCC'd (blind copied); allows you to attach documents up to several megabytes in size or links to any internet webpages; allows for a back-and-forth thread on the topic in the subject line; archives written correspondence for review even decades later; can be done on any mobile device with an internet connection; is cost-effective (beyond your subscription fees to an internet or phone provider); is somewhat permanent in that emails exist somewhere on a server even if deleted by both sender and receiver.

Disadvantages: Gives the illusion of privacy: your messages can be forwarded to anyone, monitored by your company or an outside security agency, retrieved with a warrant, or hacked even if both you and the receiver delete them; can provide delayed feedback when used for back-and-forth dialogue; tone may be misread (e.g., jokes misunderstood) due to the absence of nonverbal cues; may be sent automatically to the recipient's spam folder or otherwise overlooked or deleted without being read given the volume of emails some people get in a day; subject to errors such as clicking "send" prematurely or replying to all when only the sender should be replied to; subject to limits on document attachment size; subject to spam (unsolicited emails); regretted emails can't be taken back or edited; requires a working internet connection on a computing device, which isn't available everywhere in the world.

Expectations: Reply within 24 hours, or sooner if company policy requires it; follow conventions for writing a clear subject line, salutation, message opening, body and closing, closing salutation, and e-signature; netiquette: be as kind as you should be in person; don't write emails angrily; edit to ensure coverage of the subject indicated in the subject line with no more or less information than the recipient needs to do their job; proofread to ensure correct grammar, punctuation, and spelling because errors compromise your credibility; avoid confusion due to vagueness that requires that the recipient respond asking for clarification.

Appropriate Use: Quickly deliver a message that doesn't need an immediate response; send a message and receive a response in writing as evidence for future review (provide a paper trail); use when confidentiality isn't necessary; send electronic documents as attachments; send the same message to several people at once, including perhaps people whose email address you need to hide from the others (using BCC) to respect their confidentiality.

Channel: Instant/text message

Advantages: Enables the rapid exchange of concise written messages; can be done quietly to not be overheard; inexpensive; autocomplete feature helps achieve efficiencies in typing speed and spelling; nonverbal characters such as emojis can clarify tone; many instant message applications are available, such as Facebook Messenger, Google Talk, WhatsApp, and Snapchat.

Disadvantages: Often used to avoid human contact when the telephone or in-person communication is available and more appropriate; encourages informality with lazy abbreviations, initialism, and acronyms; even with autocomplete, typing with thumbs alone can be slower than using 10 fingers on a desktop or laptop computer; concise text alone can be misinterpreted for tone when used to summarize complex ideas; other non-verbals such as emojis help clarify tone, but also undermine credibility if used in professional situations; give the illusion of privacy: texts exist on servers and can be retrieved even if deleted by both sender and receiver;

mobility and portability of texting devices tempt users with poor impulse control to text dangerously while walking or driving, or rudely in front of people talking to them.

Expectations: Respond immediately or as soon as possible, since the choice to text or IM is usually for rapid exchange of information; be patient if the recipient doesn't respond immediately, they may be busy with real-life tasks; proofread when used for professional purposes as confusion due to writing errors can be costly when acted upon immediately; use only when able; never text when driving because the distraction turns your vehicle into a lethal weapon; never text when walking because you get in people's way, hit obstacles yourself, and look like an addict to technology.

Appropriate Use: Use for exchanging short messages quickly with someone physically distant; get an information exchange in writing for reference later; use when confidentiality isn't important.

Channel: Instagram

Advantages: Instagram for Business provides branding visuals for interested customers, especially millennials; allows customers to respond in real-time.

Disadvantages: The audience is largely limited to a younger demographic with limited spending power; means of expression is limited to photos and brief captions; can undermine professional credibility if used for selfies, which make you appear juvenile and overly self-involved; inconvenient if posting and managing an account from a laptop or desktop computer rather than a smartphone; doesn't provide an easy way to link to a company website to provide audiences with further information.

Expectations: Use for providing visuals of company products or services rather than for individual self-promotion with selfies; strike a balance in posting frequency—not too seldom, not too often; include as part of a marketing mix that includes other social media such as Facebook and Twitter.

Appropriate Use: Post company photos to reach younger demographics.

Channel: Letter

Advantages: Shows respect through formality and effort; ensures confidentiality when sealed in an envelope and delivered to the recipient's physical address (it is illegal to open someone else's mail); can introduce other physical documents (enclosures).

Disadvantages: Slow to arrive at the recipient's address depending on how far away they are from the sender; can be intercepted or tampered with in transit (albeit illegally); can be overlooked as junk mail; time-consuming to print, sign, seal, and send for delivery; mail postage is costlier than email.

Expectations: Follow conventions for different types of letters (e.g., block for company letters, modified block for personal letters) and provide the sender's and recipient's address, date, recipient salutation, closing salutation, and author's signature; use company letterhead template when writing on behalf of your organization.

Appropriate Use: For providing a formal, permanent, confidential written message to a single important person or organization; ideal for job applications (cover letter), persuasive messages (e.g., fundraising campaigns), bad-news messages, matters with possible legal implications (e.g., claims), and responses to letters; for non-urgent matters.

Channel: Memo

Advantages: Provides a written record of group decisions, announcements, policies, and procedures within an organization; can also be a format for delivering small reports (e.g., conference report) and recording negotiating terms in agreements between organizations (e.g., memo of understanding); can be posted on a physical bulletin board and/or email.

Disadvantages: Requires a good archiving system to make memos easily accessible for those (especially new employees) needing to review a record of company policies, procedures, etc.; doesn't provide immediate reader feedback or reaction.

Expectations: Use template with company letterhead; follow the same conventions as email, except omit the opening and closing salutations and e-signature.

Appropriate Use: For a written record for decisions, announcements, policies, procedures, and small reports shared within an organization; post a printed version on an office bulletin board and email it to all involved.

Channel: Report/PowerPoint

Advantages: Allows presentation of a high volume of information presenting research and analysis; can take various forms such a document booklet or proposal for reading alone or PowerPoint for presenting.

Disadvantages: Time-consuming to write with proper research documentation and visual content, as well as to prepare for (presentations); time-consuming for the busy professional to read or an audience to take in; presentations can bore audiences if not engaging.

Expectations: Follow conventions for organizing information according to the size of the report, audience, and purpose; enhance with visuals; engage audiences with effective oral delivery and visual appeal.

Appropriate Use: For providing thorough business intelligence on topics important to an organization's operation; for internal or external audiences; for persuading audiences with well-developed arguments (e.g., proposal reports).

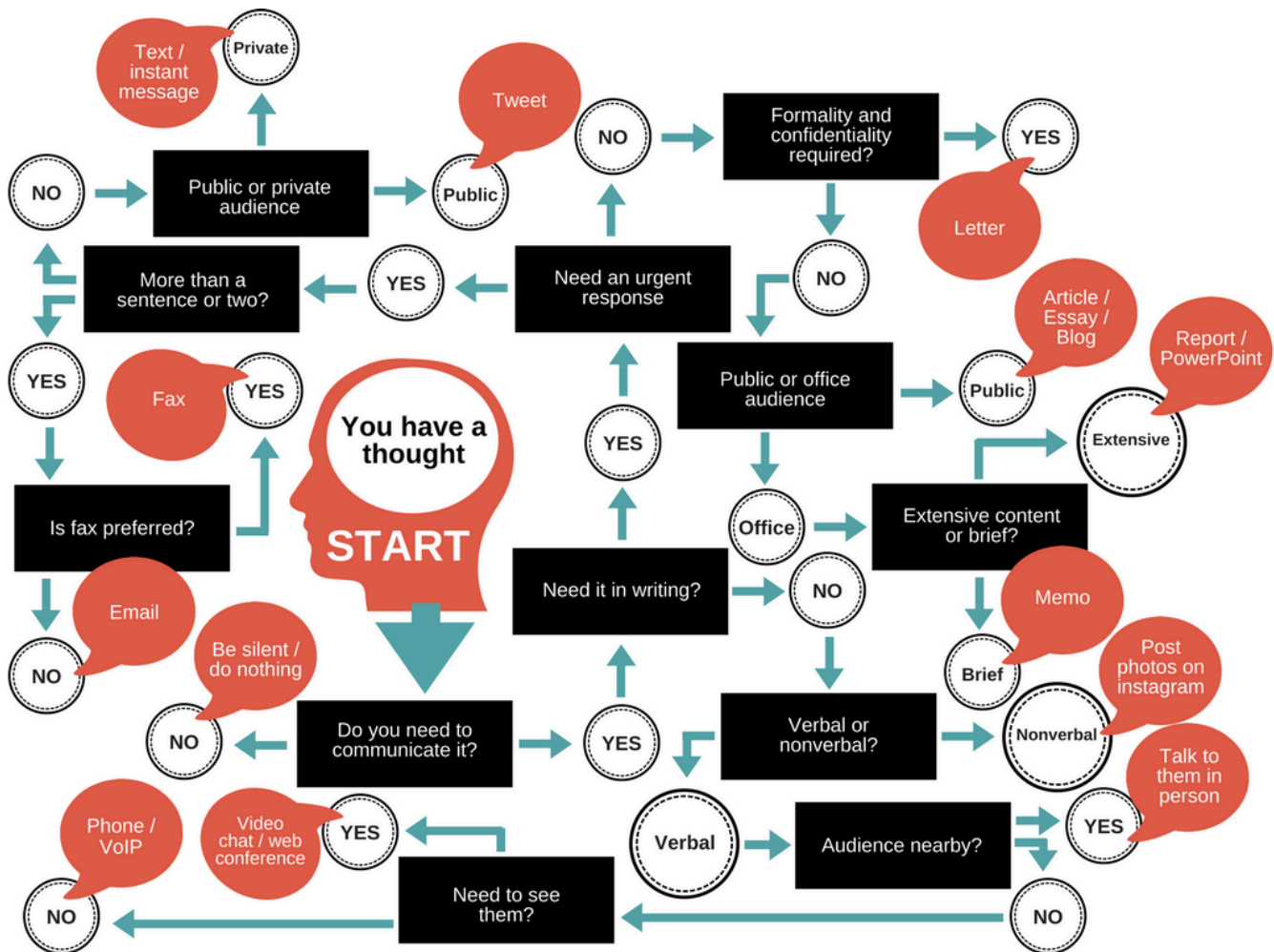
Selecting the correct communication channel on the spectrum of options using the criteria above involves a decision-making process based on the purposes of the communication, as discussed earlier in this chapter. Factors to consider include convenience for both the sender and receiver, timeliness, and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

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

All of these decisions may occur to you in the span of a second or so because they are largely habitual. Figure 2.2 charts the decision-making process for selecting the most appropriate channel among the 10 given in section 2.2.1 above.

Figure 2.2: Channel selection process flow chart

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



The uses, misuses, conventions, and implications of these channels will be discussed in the chapters ahead, especially Chapters 6–8 on written documents and Chapters 10–11 on oral communication. For now, however, let’s appreciate that choosing the most appropriate channel at the beginning of the writing process saves time—the time that you would otherwise spend correcting communication errors and doing damage control for having chosen the wrong one for the situation at hand.

Key Takeaway



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

Exercises



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

1. You come up with a new procedure that makes a routine task in your role in the organization quicker and easier; praise for your innovation goes all the way up to the CEO, who now wants you to meet with the other employees in your role in the seven other branch offices across the country to share the procedure.
2. A customer emails you for a price quote on a custom job they would like you to do for them. (Your company has a formal process for writing up quotes on an electronic form that gives a price breakdown on a PDF.)
3. You are working with two officemates on a market report. Both have been bad lately about submitting their work on time and you're starting to worry about meeting the next major milestone a few days from now. Neither has been absent because you can see them in their offices as you walk by in the hallway.
4. You are about to close a deal but need quick authorization from your manager across town about a certain discount you would like to apply. You need it in writing just in case your manager forgets about the authorization or anyone else questions it back at the office.
5. Your division recently received word from management that changes to local bylaws mean that a common procurement procedure will have to be slightly altered when dealing with suppliers. Your team meets to go over the changes and the new procedure, but you need to set it down in writing so that everyone in attendance can refer to it, as well as any new hires.
6. You have a limited amount of time to discuss a potential funding opportunity with a colleague in another city because the proposal deadline is later in the week and it's almost closing time in your

colleague's office. You'll have to hammer out some details about who will write the various parts of the proposal before you get to work on it tonight.

7. You were under contract with a local entrepreneur to perform major landscaping services. Near the end of the job, you discovered that he dissolved his company and is moving on, but you haven't yet been paid for services rendered. You want to formally inform him of the charges and remind him of his contractual obligations; in doing so you want to lay down a paper trail in case you need to take him to court for breach of contract.

Test Your Understanding



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<https://louis.pressbooks.pub/businessprofessionalcomm/?p=494#h5p-27>



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CHAPTER 3: THE WRITING PROCESS—RESEARCHING

Sumita Roy

Chapter Learning Objectives

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

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



Figure 3.3: The four-stage writing process and stage 2 breakdown

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

3.1: Choosing a Research Methodology

Section 3.1 Learning Objectives



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

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

The research methodology where you look up information and deliver the goods in an email answering someone’s question without needing to formally cite your sources is **informal research**. It is by far the most common type of research because any professional does it several times a day in their routine communication with the various audiences they serve. Say your manager emails asking you to recommend a new printer to replace the one that’s dying. You’re no expert on printers, but you know who to ask. You go to Erika, the admin. assistant in your previous department, and she says to definitely go with the Ricoh printer. You trust what she says, so you end your research there and pass along this recommendation to your manager. Now, because your source for the information, whom you don’t necessarily need to identify in informal research, was relatively subjective and didn’t explain in full why the Ricoh was better than all the other models available, you can’t really have 100% confidence in the recommendation you pass along. This type of research will do in a pinch when you’re short on time and your audience doesn’t need to check your sources.

Formal research, on the other hand, takes a more systematic approach and documents the sources of information compiled using a conventional citation and reference system designed to make it easy for the audience to check out your sources themselves to verify their credibility. Formal research is more scientific in discovering needed information or solving a problem, beginning with a hypothesis (your main idea when you begin, which, in the case above, could be that the Ricoh *might* be the best printer), and then testing that

hypothesis in a rigorous way. In this case you would come up with a set of criteria, including certain features and capabilities that you need your printer to have, cost, warranty and service plan, availability, etc. Next you would look at all the accessible literature on the printers available to you, including the product web pages and spec manuals, customer reviews from other vendors, and reviews from reputable sources such as *Consumer Reports*, which gets experts to test the various available models against a set of criteria. Finally, you could test the printers yourself, score them according to your assessment criteria, rank the best to worst, and report the results.

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

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

Like formal vs. informal research, primary vs. secondary has much to do with the level of rigor. Basically, **primary research** generates new knowledge, and secondary research applies it. In the above case, the authors of the *Consumer Reports* article conducted primary research because they came up with the assessment criteria, arranged for access to all the printers, tested and scored each according to how well they performed against each criterion, analyzed the data, determined the ranking of best to worst printer on the market, and reported it in a published article. If you can’t conduct primary research yourself because you don’t have easy access to all the printers worth considering, you are thankful someone else has and would even pay money for that information.

Other forms of primary research include surveys of randomly sampled people to gauge general attitudes on certain subjects and lab experiments that follow the scientific method. If a pharmaceutical company is researching a new treatment option for a particular health condition, for instance, it starts in the chemistry lab producing a compound that could be put in a pill, tests its safety on animal subjects, then runs human trials where it’s given to as many test subjects as possible. Some are given a placebo without knowing it (making them “blind”) by someone on the research team who also doesn’t know whether it’s the real pill or the placebo (making the study “double blind”). Close observation of the effects on people with the condition and

without, having taken the new pill and the placebo, determines whether the new drug is actually effective and safe. Primary research is labor-intensive, typically expensive, and may include aspects of secondary research if referring to previous primary research.

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

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

Key Takeaway



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

Exercise



Use your college library account to access *Consumer Reports* and find a report on a product type of interest to you. Assuming that your audience's needs are for informal secondary research only, write a mock (pretend) email making a recommendation based on the report's endorsement.

3.2: Locating Credible Sources

Section 3.2 Learning Objectives



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

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

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

College or public libraries and their online databases are excellent places to find quality sources, and you should familiarize yourself with their features, such as subject guides and advanced search filters. Even libraries

are populated by sources outside the realm of respectability, however, because they cater to diverse stakeholders and interests by being comprehensive, including entertainment materials in their collections. They also have holdings that are out of date and only of historical interest. Whether in the library or on the open internet, the only real way to ensure that a source is worth using is to develop critical-thinking skills in knowing what to look for in sorting the wheat from the chaff.

- [3.2.1: Assessing the Credibility of Print Sources](#)
- [3.2.2: Assessing the Credibility of Online Sources](#)

3.2.1: Assessing the Credibility of Print Sources

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

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

- **Author credentials:** If the author is identified by name and credentials, you can verify whether they are expert enough on the topic to be a credible authority.
 - Generally, the higher the credential or industry position an author holds, the more credible you can expect them to be. An author with a PhD (doctoral credential) in psychology will be a credible authority on matters of psychology because they have legitimate expertise. A talk-show host, on the other hand, lacks credibility and expertise on such topics since she doesn't have the same years of focused study, training, and clinical practice in the field. The PhD is a more advanced credential than a master's degree, which is more advanced than an undergrad (four-year bachelor's) degree, which is more advanced than a college diploma or certificate, which is more advanced than a high school diploma. In the absence of more detailed information, you can roughly gauge how credible an authority someone is on a topic based on where they fall on that spectrum of education.
 - Years of successful industry experience is also a trustworthy credential. If the author of a trade journal article has 35 years of experience in the industry, 20 of those as an owner of a thriving

business, you can expect expert knowledge from them if their topic is on matters directly related to their profession.

- Likewise, a blogger can only be taken seriously if they are a working professional writing about their work, and they shouldn't be relied on outside of their area of expertise.
 - A blogging hobbyist might have some interesting things to say, but without expert training and credentials, her word doesn't carry much weight. If a backyard astronomer discovers something major in the night sky, for instance, it takes verification and systematic cataloging from credentialed astronomers employed by renowned institutions before the discovery is considered real.
- **Currency:** Depending on the topic, how recently the source was published can be a key indicator of credibility.
 - A book on communications technology from 1959 is no longer a relevant authority on communications because technology has changed so much since then. A 1959 writing guide such as Strunk and White's *Elements of Style*, however, is mostly still relevant because we still value its advice on writing concisely and because language hasn't changed drastically since then. (More recent editions have dispensed with outdated advice like using masculine pronouns exclusively when referring to writers, however, since we now value writing that's not gender-exclusive.)
 - In technology fields generally, a source may be considered current if it was published in the past 5–10 years; in some sub-disciplines, especially in computing, currency may be reduced to more like 1–2 years depending on how fast the technology is advancing. Disciplines that advance at a slower pace may have major sources still current even after 15–20 years because nothing has come along to replace them.
 - **Author objectivity:** If the author argues entirely on one side of a debate on which experts disagree, be suspicious of the source's credibility.
 - If the author identifies the other sides of a debate and convincingly challenges them with strong evidence and sound reasoning, then their work is worth considering.
 - If the author ignores the controversy altogether, summarily dismisses alternative points of view out of hand, offers dubious arguments driven by logical fallacies, simplifies complex issues by washing out any nuance, or appears to be driven more by profit motive than dedication to the truth, then "buyer beware." Using such an extremely slanted source will undermine your own credibility.
 - Company websites, especially for smaller businesses, are generally suspect because their main goal is to attract customers and ultimately profit, so they're not going to focus too much on information that may give potential customers reason to think twice no matter how legitimate it is. A home security alarm company, for instance, is probably not going to post crime statistics in an area that has record-low criminal activity because people will conclude that home security is a non-issue and therefore not worth spending money on. The company is more likely to sidestep rational appeal

and prey instead on fears and anxieties by dramatizing scenarios in which your home and loved ones are violated by criminals. If the company website focuses on education, however, by explaining what to look for to assess the credibility of the professional you're seeking, then you are probably looking at a successful operation that does quality work and doesn't need to fleece you in order to survive.

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

your writing is organized and well structured, abides by accepted conventions, and is error-free, your thinking tends toward all such qualities too. If someone’s writing is a mess and rife with errors, on the other hand, it often betrays a scattered and careless mind.

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

Eliminating Bias: In order to express a neutral viewpoint, make sure that all sides of the argument have been explored. While conducting research on a topic, especially a new topic, it is customary to read anything or everything related to it. While there is nothing wrong with this approach, it can be time-consuming. However, it gives you an overview of all related aspects of the topic. Oftentimes, writers strongly identify with a slant or an approach to a particular topic. Writers may feel passionate about certain beliefs and convictions that might just close their minds to other aspects of the topic. For instance, if a writer feels strongly about abortion or gun control, it is important to keep an open mind.

When writing a persuasive document or a recommendation report, the intended audience expects a comprehensive and analytical document that has explored the topic from all angles. In order to gain the trust and respect of an audience and improve the efficiency of a business document, the writer should eliminate all hints of bias from research and writing. The writer must be logical and impartial while collecting and analyzing data and incorporating the findings in the business document. The *Oxford English Dictionary* defines “bias” as a “tendency to favour or dislike a person or thing, especially as a result of a preconceived opinion; partiality, prejudice” (“bias” from *Oxford English Dictionary*). As indicated earlier, bias inadvertently creeps in when writers feel very strongly about a topic. When this happens, messages may be distorted. Sometimes, these issues or topics do not always have clear-cut resolutions or solutions. Examples of such topics could be:

- Pulling out American soldiers from Afghanistan
- Closing national borders to refugees
- Mandating restrictions to control the spread of the Covid virus

Evidently, topics such as these invoke strong feelings and opinions. In order to maintain impartiality, one must, thus, implement the Hegelian principle of duality. The Hegelian principle of duality suggests that there are

two sides to each entity—the thesis and the anti-thesis. In order to achieve synthesis, one must consider both opposing elements.

Section 3.1 discusses how one must conduct research. In order to eliminate bias from writing, a writer should visit authorized websites for reliable information. Blogs, typically, should be avoided, as they provide a forum for personal opinions and reflections. Commercial websites often contain promotional material and should not be used for research (*Business Writing for Success*). To improve the validity of research, a writer should generally rely on government websites and websites of non-profit organizations.

Exercise

Review the editorial section in the *New York Times* and pick a topic that you feel strongly about. Analyze the writer’s point of view. Does the writer discuss both sides of the argument? Is the writer fair or biased?

Test Your Understanding



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://louis.pressbooks.pub/businessprofessionalcomm/?p=505#h5p-40>

3.2.2: Assessing the Credibility of Online Sources

Online sources pose special challenges to students and professionals conducting research, since most will expediently conduct research entirely online, where some of the above indicators of credibility must be

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

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

A *Wikipedia* article can be a good place to start in a research task, however. If you're approaching a topic for the first time, use *Wikipedia* for a general introduction and a sense of the topic's scope and key subtopics. (*Wikimedia Commons* is also a reliable source of images provided you credit them properly.) But if you're going to cite any sources, don't stop there; use the credible ones that the *Wikipedia* article cites by scrolling down to the References section, checking them out, and assessing them for their credibility using the criteria outlined above in [§3.2.1](#).

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

Key Takeaway



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

Exercises



1. Choose a research topic based on an aspect of your professional field that piqued your attention in your other courses in the program. Assemble credible sources using a rubric that ranks each relevant source based on the assessment criteria explained in [§3.2.1](#) above (e.g., the criterion for the first line of the rubric may be Author Credibility, which you can score out of 10, with 10 being a bona fide expert in their field and 0 being a dilettante with no experience; the second may be Currency, with 10 points going to a source published last year and 0 for something a century or more out of date, etc.). With each score for each source, give a brief explanation for why you scored it as you did.
2. Consider a recent controversy in the news that all news outlets have covered. Assemble articles from a variety of outlets throughout Canada, the United States, and even internationally, including those with a major audience share like the CBC, CNN, FoxNews, and the *Guardian*, as well as some on the fringe. First compare the articles to identify the information that's common to them all, then contrast them to identify the information and analysis that distinguishes them from one another. What conclusions can you draw about how bias factors into the reportage of world events?

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3.3: Collecting Sources by Reading with a Purpose

Section 3.3 Learning Objectives



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

Part of the process of identifying credible sources involves reading critically to find the best information available for your purposes, and those are whatever you've determined your audience's needs to be. When collecting sources online by entering key terms into a search engine, examining the list of titles, and clicking on

those that seem relevant, you begin the process of narrowing down your topic by what research materials are available. Of course, you don't have time to read *all* the thousands or even millions of web pages and articles that turn up in Google search results to determine which fulfill your (and your audience's) purposes. You skim.

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

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

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

During this process you will encounter plenty of information in sources that may both confirm and contradict what you already know about your topic. It's important that you do what you're supposed to do as a student: keep an open mind and learn! Refrain from simply discarding contradictory information that will over-complicate your argument. If it turns out that a reputable source undermines your argument entirely,

then this is the right point in the game to change your argument so that you don't end up embarrassing yourself in the end with a fantasy-driven document. If you're doing a research report into the viability of a waste-to-energy gasification facility, for instance, and you really want to say that it solves both your city's municipal garbage disposal and energy production needs, you don't want to find yourself too far down that road before addressing why no such facility has ever achieved profitable positive energy production. Ignoring such a record and the reasons why investors tend to avoid such opportunities, such as the failed attempts at producing black pellets in North America, will undermine your credibility.

As a final word of warning, be careful with how you collect source content so that you don't accidentally plagiarize by the time you use the sources you've collected in your final document. If you copy and paste text from sources into your notes as a basis for quotations or paraphrases, ensure that you put quotation marks around it and cite the page numbers (if the source has them) or paragraph numbers (if it doesn't have page numbers) in parentheses immediately following the closing quotation marks so you can properly cite them if you go on to use them later. If you don't put quotation marks around copied text, you run the risk of committing plagiarism by rolling unmarked quotations into your final document; even if you cite them, implying that you've paraphrased when you've really quoted still counts as a breach of academic integrity. We will return to the problem of plagiarism in the next section ([§3.4](#)) when we continue examining the process of building a document around research, but at this point it's worth reviewing your collection of research material to ensure that it meets the needs of the audience and works toward fulfilling the purpose you determined at the outset of the writing process.

Key Takeaway



Narrowing down a research topic involves skimming through database search results to select relevant sources as well as skimming through source text to pull out main points that support your hypothesis by knowing where to find them. Noting down documentation details with references to author name, title, page number, and year of publication saves time and helps avoid plagiarism.

Exercise



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

Reference

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

3.4: Using Source Text: Quoting, Paraphrasing, and Summarizing

Section 3.4 Learning Objectives



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

Once you have a collection of credible sources as part of a formal secondary research project such as a report, your next step is to build that report around those sources, using them as anchors of evidence around your

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

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

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

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

- [3.4.1: Quoting Sources](#)
- [3.4.2: Paraphrasing Sources](#)
- [3.4.3: Summarizing Sources](#)

3.4.1: Quoting Sources

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

- **Use double quotation marks:** In North America, we set off quoted words from our own words with double quotation marks (“ ”). Opening quotation marks look a little like a tiny superscript “66” and the closing marks like “99.” For a mnemonic device, you might want to think of a quotation as a hockey legend play with Mario Lemieux (jersey number 66) setting up Wayne Gretzky (99) for the goal.
 - You may have seen single quotation marks and think that they're also acceptable to use, but that's only true in the UK and some other Commonwealth countries, not in Canada and the United States; some European countries use << >> to set off quotations instead.
 - Also use double quotation marks for putting a single word or two in “scare quotes” when you're

- drawing attention to how people use certain words and phrases—again, not single quotation marks, since there is no such thing as quotation marks “lite.”
- Use **single quotation marks** only for reported speech when you have a quotation within a quotation, as in “The minister responded to say, ‘No comment at this time’ regarding the allegations of wrongdoing.”
 - If no parenthetical citation follows immediately after the closing quotation marks, the sentence-ending period falls to the *left* of those closing quotation marks (between the final letter and the “99”); a common mistake is to place the period to the right of the closing quotation marks (“... wrongdoing”).
- **Use a signal phrase to integrate a quotation:** Frame a quotation with a “signal phrase” that identifies the source author or speaker by name and/or role along with a verb relating how the quotation was delivered. The signal phrase can precede, follow, or even split the quotation, and you can choose from a variety of available signal phrase expressions suitable for your purposes ([Hacker, 2006, p. 603](#)):
 - According to researchers Tblisky and Darion (2003), “. . .”
 - As Vice President of Operations Rhonda Rendell has noted, “. . .”
 - John Rucker, the first responder who pulled Mr. Warren from the wreckage, said that “. . .”
 - Spokespersons Gloria and Tom Grady clarified the new regulations: “. . .”
 - “. . .,” confirmed the minister responsible for the initiative.
 - “. . .,” writes Eva Hess, “. . .”
 - **Quote purposefully:** Quote only when the original wording is important. When we quote famous thinkers like Albert Einstein or Marshall McLuhan, we use their exact words because no one could say it better or more interestingly than they did. Also quote when you want your audience to see wording *exactly* as it appeared in the source text or as it was said in speech so that they can be sure that you’re not distorting the words as you might if you paraphrased instead. But if there’s nothing special about the original wording, then you’re better off paraphrasing properly (see §3.4.2 below) than quoting.
 - **Block-quote sparingly if at all:** In rare circumstances, you may want to quote a few sentences or even a paragraph at length if it’s important to represent every single word. If so, the convention is to tab the passage in on both the left and right, not use quotation marks at all, set up the quotation with a signal phrase or sentence ending with a colon, and place the in-text citation following the final period of the block quotation. Consider the following example:
 - Students frequently overuse direct quotation [when] taking notes, and as a result they overuse quotations in the final [research] paper. Probably only about 10% of your final manuscript should appear as directly quoted matter. Therefore, you should strive to limit the amount of exact transcribing of source materials while taking notes. (Lester, 1976, pp. 46–47)
 - **Don’t overquote:** As the above source says, a good rule of thumb is that your completed document should contain no more than 10% quoted material. Much above that will look lazy because it appears that you’re getting quotation to write your document for you. Quote no more than a sentence or two at

a time if you quote at all.

- **Quote accurately:** Don't misquote by editing the source text on purpose or fouling up a transcription accidentally. Quotation requires the *exact* transcription of the source text, which means writing the same words in the same order in your document as you found them in the original.
 - To avoid introducing spelling mistakes or other transcription errors, best practice (if your source is electronic) is to highlight the text you want to quote, copy it (Ctrl + c), and paste it (Ctrl + v) into your document so that it matches the formatting of the rest of your document (i.e., with the same font type, size, etc.). To match the formatting, use the Paste Options drop-down menu that appears beside pasted text as soon as you drop it in and disappears as soon as you perform any operation other than clicking on the drop-down menu.
- **Use brackets and ellipses to indicate edits to quotations:** If you need to edit a quotation to be grammatically consistent with your own sentences framing the quotation (e.g., so that the tense is consistently past tense if it is present tense in the source text), add clarifying words, or delete words, do so using brackets for changed words and ellipses for deleted words as you can see in the Lester block quotation above.
 - Though many people mistakenly refer to parentheses () as “brackets,” brackets are squared [] and are used mainly to indicate changes to quoted words, whereas parentheses follow the quotation and mark off the citation. If you were to clarify and streamline the final sentence of the block quotation a few points above, for instance, you could say something like: Lester (1976) recommended “limit[ing] the amount of exact transcribing . . . while taking notes” (p. 47). Here, the verb “limit” in the source text needs to be converted into its participle form (having an *-ing* ending) to follow the past-tense verb in the sentence framing the quotation grammatically. Sneakily adding the “ing” to “limit” without using brackets would be *misquotation* because “limiting” appears nowhere in the original.
 - Notice that the ellipsis above is three *spaced* periods (not three stuck together, as in “...”) and that one doesn't appear at the beginning of the quotation to represent the words in the original prior to “limit” nor at the end to represent source text following the quoted words (“... limit ...”). Use the ellipsis only to show that you're skipping over unnecessary words *within* a quotation.
 - Be careful not to use brackets and ellipses in a way that distorts or obscures the meaning of the original text. For instance, omitting “Probably” and changing “should” to “[can]” in the Lester quotation above will turn his soft guideline into a hard rule, which is not the same.
 - If the quotation includes writing errors such as spelling mistakes, show that they're the author's (rather than yours) by adding “[sic]” immediately after each error (“*sic*” abbreviates *sic erat scriptum*, Latin for “thus it had been written”), as in:
 - When you said in the class discussion forum, “No one cares about grammer, [sic] it doesnt [sic] really matter,” you tend to undermine your credibility on the topic with poor spelling and a comma splice.

- Capitalize as in the original, even if it seems strange to start a quotation with a capital (because it was the first word in the original) though it's no longer the first word because it follows a signal phrase in your sentence. See the example in the point above, for instance.
- Quotation is a powerful tool in the arsenal of any writer needing to support a point with evidence. Capturing the source's words exactly as they were written or spoken is an honest way of presenting research. For more on quotation, consult *Purdue OWL's* series of modules starting with the [How to Use Quotation Marks](#) page and ending with their [Exercise](#).

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3.4.2: Paraphrasing Sources

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

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

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

Notice that using a few isolated words from the original (“research,” “students,” “10%”) is fine but also that this paraphrase doesn’t repeat any two-word sequence from the original because it changes the sentence structure along with most of the words. Properly paraphrasing without distorting, slanting, adding to, or deleting ideas from the source passage takes skill. The stylistic versatility required to paraphrase can be especially challenging to ESL learners whose general writing skills are still developing.

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

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

Let’s look at the same attempt, highlighting the unchanged words in bold to see how unsuccessful the paraphraser was in rephrasing the original in their own words:

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

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

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

1. Read and re-read the source-text passage so that you thoroughly understand each point it makes. If it’s a long passage, you might want to break it up into digestible chunks. If you’re unsure of the meaning of

any of the words, look them up in a dictionary; you can even just type the word into the Google search bar, hit *Enter*, and a definition will appear along with results of other online dictionary pages that define the same word.

2. Look away and get your mind off the target passage. Process some different information for a while (e.g., a few minutes of gaming or social media—but just a few!).
3. Without looking back at the source text, repeat its main points as you understood them—not from memorizing the exact words but as you would explain the same ideas in different words out loud to a friend.
4. Still without looking back at the source text, jot down that spoken wording and tailor the language so that it’s stylistically appropriate for your audience; edit and proofread your written version to make it grammatically correct in a way that perhaps your spoken-word version wasn’t.
5. Now compare your written paraphrase version to the original to ensure that:
 - You’ve accurately represented the meaning of the original without:
 - Deleting any of the original points
 - Adding any points of your own
 - Distorting any of the ideas so they mean something substantially different from those in the original or even take on a different character because you use words that, say, put a positive spin on something neutral or negative in the original
 - You haven’t repeated any two identical words from the original in a row
6. If any two words from the original remain, go further in changing those expressions by using a thesaurus in combination with a dictionary. When you enter a word into a thesaurus, it gives you a list of synonyms, which are different words that mean the same thing as the word you enter into it.
 - Be careful, however; many of those words will mean the same thing as the word you enter into the thesaurus in certain contexts but not in others, especially if you enter a homonym, which is a word that has different meanings in different parts of speech.
 - For instance, the noun *party* can mean a group that is involved in something serious (e.g., a third-party software company in a data-collection process), but the verb *party* means something you do on a wild Saturday night out with friends; it can also function as an adjective related to the verb (e.g., *party trick*, meaning a trick performed at a party).
 - Whenever you see synonymous words listed in a thesaurus and they look like something you want to use but you don’t know what they mean exactly, always look them up to ensure that they mean what you hope they mean; if not, move on to the next synonym until you find one that captures the meaning you intend. Doing this can save your reader the confusion and you the embarrassment

of obvious thesaurus-driven diction problems (poor word choices).

7. Cite your source. Just because you didn't put quotation marks around the words doesn't mean that you don't have to cite your source. (For more on citing, see §3.5.2 below.)

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

Reference

Purdue Online Writing Lab. *Paraphrasing*. *Purdue OWL*. Retrieved from https://owl.purdue.edu/owl/research_and_citation/using_research/quoting_paraphrasing_and_summarizing/paraphrasing

3.4.3: Summarizing Sources

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

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

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

1. Determine how big your summary should be (according to your audience's needs) so that you have a

sense of how much material you should collect from the source.

2. Read and re-read the source text so that you thoroughly understand it.
3. Pull out the main points, which usually come first at any level of direct-approach organization (i.e., the prologue or introduction at the beginning of a book, the abstract at the beginning of an article, or the topic sentence at the beginning of a paragraph); review §3.3 above on reading for main points and §4.1 on organizational patterns.
 - Disregard detail such as supporting evidence and examples.
 - If you have an electronic copy of the source, copy and paste the main points into your notes; for a print source that you can mark up, use a highlighter, then transcribe those main points into your electronic notes.
 - How many points you collect depends on how big your summary should be (according to audience needs).
4. Paraphrase those main points following the seven-step procedure for paraphrasing outlined in §3.4.2 above.
5. Edit your draft to make it coherent, clear, and especially concise.
6. Ensure that your summary meets the needs of your audience and that your source is cited. Again, not having quotation marks around words doesn't mean that you are off the hook for documenting your source(s).

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

Key Takeaway



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

Exercises



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

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

3.5: Documenting Sources in APA, MLA, or IEEE Styles

Section 3.5 Learning Objectives



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

To prove formally that we've done research, we use a two-part system for documenting sources. The first part

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

- [3.5.1: Academic Integrity vs. Plagiarism](#)
- [3.5.2: Citing and Referencing in APA Style](#)
- [3.5.3: Citing and Referencing in MLA Style](#)
- [3.5.4: Citing and Referencing in IEEE Style](#)
- [3.5.5: Citing Images and Other Media](#)

3.5.1: Academic Integrity vs. Plagiarism

Academic integrity basically means that you do your work yourself and formally credit your sources when you use research, whereas plagiarism is cheating. Students often plagiarize by stealing the work of others from the internet (e.g., copying and pasting text or dragging and dropping images) and dumping it into an assignment without quoting or citing; putting their names on that assignment means that they've dishonestly presented someone else's work as their own. Lesser violations involve not quoting or citing properly. But why would anyone try to pull one over on their instructor like this when instructors award points for doing research? If you're going to do your homework, you might as well do it right by finding credible sources, documenting them, and getting credit for doing so rather than sneak your research in as if you'll get points for originality, for coming up with professional-grade material yourself, and end up getting penalized for it. But what makes plagiarism so wrong?

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

1. They want their description of the service to look professional, so they Google-search to see what other companies offering the same service say about it on their websites. So far so good.
2. Those other descriptions look good, and the employee can't think of a better way to put it, so they copy

- and paste the other company’s description into their own websites. Here’s where things go wrong.
3. They also see that the other company has posted an attractive photo beside their description, so the employee downloads that and puts it on their website also.

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

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

Plagiarism, whether done deliberately or accidentally, is defined as presenting someone else’s work, in whole or in part, as one’s own. It includes the verbal or written submission of another work without crediting that source. This applies to ideas, wording, code, graphics, music, and inventions. It includes all electronic sources, including the Internet, television, video, film, and recordings, all print and written sources, such as books, periodicals, lyrics, government publications, promotional materials, and academic assignments; and all verbal sources such as conversations and interviews. Sharing one’s work with other students is also considered an act of plagiarism. ([Algonquin College, 2016](#))

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

Algonquin’s penalties for plagiarizing increase with each offense. Whether accidental or deliberate, your first act of plagiarism might result in getting a grade of zero on the assignment. However, the instructor may give you the opportunity to correct just the plagiarism in it, resubmit it, and get the mark you would have earned originally if not for the plagiarism. For instance, if your grade would have been 85% if it hadn’t been zeroed due to the plagiarism, the instructor can change the grade back to 85% as soon as they see that you’ve corrected the plagiarism but just leave the grade at 0% if you don’t bother to correct it. Depending on the instructor and

department, your instructor may submit the details to their manager so that a record of the offense is logged in case a second offense happens in that course or another in the program. That way, the manager can see a pattern of plagiarism across all of the student's courses, a pattern that the instructors in each individual course don't see.

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

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

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

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

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

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

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

But do you need to cite absolutely *everything* you research? Not necessarily. Good judgment is required to know what information can be left uncited without penalty. If you look up facts that are common knowledge (perhaps just not common to you yet, since you had to look them up), such as Neil Armstrong, the first man to set foot on the moon, you wouldn't need to cite them because any credible source you consulted would say the same. Such citations end up looking like attempts to pad an assignment with research.

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

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3.5.2: Citing and Referencing Sources in APA Style

As mentioned above, a documentation system comes in two parts, the first of which briefly notes a few details about the source (author, year, and location) in parentheses immediately after you use the source, and this citation points the reader to more reference details (title and publication information) in a full bibliographical entry at the end of your document. Let’s now focus on these in-text citations (“in-text” because the citation is placed at the point of use in your sentence rather than footnoted or referenced at the end) in the different documentation styles—APA, MLA, and IEEE—used by different disciplines across the college.

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

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

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

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

- The author’s last name (surname) and the year of publication (in that order) can appear either in the signal phrase or in the citation, but not in both. Table 3.5.2 below shows both options (e.g., Examples 1 and 3 versus 2 and 4, etc.).
- When two authors are credited with writing a source, their surnames are separated by “and” in the signal phrase and an ampersand (&) in the parenthetical citation (see Examples 3–4 in Table 3.5.2 below).
- When 3–5 authors are credited, a comma follows each surname (except the last in the signal phrase) and citation, and the above and/& rule applies between the second-to-last (penultimate) and last surname.
 - When a three-, four-, or five-author source is used again following the first use (i.e., the second, third, fourth time, etc.), “et al.” (abbreviating *et alium* in Latin, meaning “and the rest”) replaces all but the first author surname.
 - See Examples 5–6 in Table 3.5.2 below.
- If two or more authors of the same work have the same surname, add first/middle initials in the citation as given in the References at the back.
- If no author name is given, either use the organization or company name (corporate author) or, if that’s not an option, use the title of the work in quotation marks.
 - If the organization is commonly referred to by an abbreviation (e.g., “CIHR” for the Canadian Institutes of Health Research), spell out the full name in the signal phrase and put the abbreviation in the parenthetical citation the first time you use it, or spell out the full name in the citation and add the abbreviation in brackets before the year of publication that first time, then use the abbreviation for all subsequent uses of the same source. (See Examples 9–10 in Table 3.5.2 below.)
 - If no author of any kind is available, the citation—e.g., (“APA Style,” 2008)—and the bibliographical entry at the back would move the title “APA style” (ending with a period and not in quotation marks) into the author position with “(2008)” following rather than preceding it.
- If the source you’re using quotes another source, try to find that other original source yourself and use it instead. If it’s important to show both, you can indicate the original source in the signal phrase and the source you accessed it through in the citation, as in:
 - Though kinematics is now as secular as science can possibly be, in its 1687 *Principia Mathematica* origins Sir Isaac Newton theorized that gravity was willed by God (as cited in Whaley, 1977, p. 64).

2. **Year** of Publication

- The publication year either follows the author surname in parentheses on its own if in the signal phrase (see the odd-numbered Examples in Table 3.5.2 below) or follows a comma if both are in the citation instead (even-numbered examples).

- If the full reference also indicates a month and date following the year of publication (e.g., for news articles, blogs, etc.), the citation still shows just the year.
- If you cite two or more works by the same author published in the same year, follow the year with lowercase letters (e.g., 2018a, 2018b, 2018c) in the order that they appear alphabetically by title (which follows the author and year) in both the in-text citations and full bibliographical entries in the References at the back.

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

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

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

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

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

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

For more on APA-style citations, see Purdue OWL’s [In-Text Citations: The Basics](#).

In combination, citations and references offer a reader-friendly means of enabling readers to find and retrieve research sources themselves, as each citation points them to the full bibliographical details in the

References list at the end of the document. If the documentation system were reduced to just one part where citations were filled with the bibliographical details, the reader would be constantly impeded by 2–3 lines of bibliographical details following each use of a source. By tucking the bibliographical entries away at the back, authors also enable readers to go to the References list to examine at a glance the extent to which a document is informed by credible sources as part of a due-diligence credibility check in the research process.

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

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

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

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

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

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

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

- **Author(s):** The last name followed by a comma and the author's first initial (and middle initial[s] if given)
 - For two authors, add a comma and ampersand (&) after the first author's initials.
 - For three or more authors, add a comma after each (except for the last one) and add an ampersand between the second-to-last (penultimate) and last author.
 - Follow the order of author names as listed in the source. If they are in alphabetical order already, it may be because equal weight is being given to each; if not, it likely means that the first author listed did most of the work and therefore deserves first mention.
 - If no personal name is given for the author, use the name of the organization (i.e., corporate author) or editor(s) (see the point on editors below).

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

make it sentence style (see the *Elements of Style* example above, which becomes “*Elements of style*”).

- If the book is a later edition, add the edition number in parentheses and plain style following the title (again, see the *Elements of Style* example above).
- **Editor(s):** If a book identifies an editor or editors, include them between the title and publication information with their first-name initial (and middle initial if given) and last name (in that order), “(Ed.)” for a single editor or “(Eds.)” for multiple editors (separated by an ampersand if there are only two and commas plus an ampersand if there are three or more), followed by a period.
 - If the book is a collection of materials, put the editor(s) in the author position with their last name(s) first followed by “(Ed.)” or “(Eds.),” a period, then the year of publication, etc.
- **Publication information:** The city in which the publisher is based followed by a colon, the name of the publisher, and a period.
 - If the city is a common one such as New York City or Toronto, just put “New York” or “Toronto,” but if it’s an uncommon one like Nanaimo, follow it with a comma, provincial or state abbreviation, and then the colon (e.g., Nanaimo, BC:) and publisher name.
 - Keep the publisher name to the bare essentials; delete corporate designations like “Inc.” or “Ltd.”
- **Web information:** If the source is entirely online, replace the publisher location and name with “Retrieved from” and the web address (URL).
 - If the online source is likely to change over time, add the date you viewed it in “Month DD, YYYY,” style after “Retrieved” so that a future reader who follows the web address to the source and finds something different from what you quoted understands that what you quoted has been altered since you viewed it.
 - If the source is a print edition (book, magazine article, journal article, etc.) that also has an online version, give the publication information as you would for the print source and follow it with the online retrieval information.
 - If all you’re doing is mentioning a website in your text, you can just give the root URL (e.g., APAStyle.org without the “http://www” prefix) in your text rather than cite and reference it.
- **Magazine/journal volume/issue information:** If the source is a magazine or journal article, replace the publisher information with the volume number, issue number, and page range.
 - Follow the italicized journal title with a comma, the volume number in italics, the issue number in non-italicized parentheses (with no space between the volume number and the opening parenthesis), a comma, the page range with a hyphen between the article’s first and last page numbers, and a period.
 - The Dames article given as an example above, for instance, spans pages 25-27 of the June issue (i.e.,

#6) of the monthly journal *Computers in Libraries*' 27th volume.

- **Other source types:** If you often encounter other source types, such as government publications, brochures, presentations, etc., getting a copy of the *Publication Manual of the American Psychological Association* (APA, 2009) might be worth your while. If you're a more casual researcher, you can consult plenty of online tutorials for help with APA style such as:
 - [Learning APA Style](#) and link to the free flash slideshow "The Basics of APA Style: Tutorial" (APA, 2018)
 - [Reference List: Basic Rules](#) (Purdue OWL) and the pages following

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

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

- To do this:

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

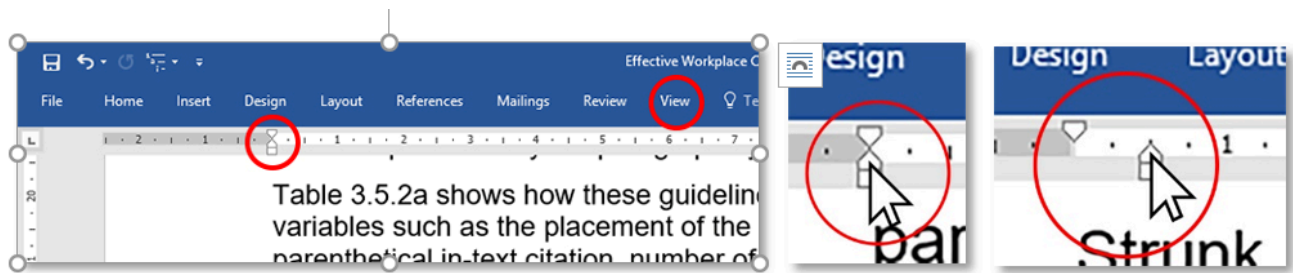


Figure 3.5.2: Tabbing a References list by making the left-margin tab visible, clicking on the bottom triangle, and dragging it a half centimeter to the right

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

References

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

APA. (2009). *Publication manual of the American Psychological Association* (6th ed.). Washington, DC: American Psychological Association.

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

Mental Health Commission of Canada. (2012). *Changing directions, changing lives: The mental health strategy for Canada*. Calgary: MHCC. Retrieved from

<http://strategy.mentalhealthcommission.ca/pdf/strategy-images-en.pdf>

Purdue Online Writing Lab. In-text citation: The basics. *Purdue OWL*. Retrieved from

https://owl.purdue.edu/owl/research_and_citation/apa_style/apa_formatting_and_style_guide/in_text_citations_the_basics.html

Purdue Online Writing Lab. Reference list: Basic rules. *Purdue OWL*. Retrieved from

https://owl.purdue.edu/owl/research_and_citation/apa_style/apa_formatting_and_style_guide/reference_list_basic_rules.html

Strunk, W., & White, E. B. (2000). *Elements of style* (4th ed.). Boston: Allyn & Bacon. Retrieved from <http://www.jlakes.org/ch/web/The-elements-of-style.pdf>

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

3.5.3: Citing and Referencing Sources in MLA Style

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

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

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

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

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

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

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

The following points cover major differences between MLA and APA:

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

For more on MLA Works Cited conventions, see [MLA Works Cited Page: Basic Format](#) (Purdue OWL) and the pages following it.

References

Purdue Online Writing Lab. MLA in-text citations: The basics. *Purdue OWL*. Retrieved from https://owl.purdue.edu/owl/research_and_citation/mla_style/mla_formatting_and_style_guide/mla_in_text_citations_the_basics.html

Purdue Online Writing Lab. MLA works cited page: Basic format. *Purdue OWL*. Retrieved from https://owl.purdue.edu/owl/research_and_citation/mla_style/mla_formatting_and_style_guide/mla_works_cited_page_basic_format.html

3.5.4: Citing and Referencing Sources in IEEE Style

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

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

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

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

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

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

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

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

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

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

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

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

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

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

References

IEEE editorial style manual. (n.d.). Retrieved from https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/style_references_manual.pdf

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

3.5.5: Citing Images and Other Media

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

Whether you've been granted permission, own the image yourself, or not, you must still credit the source of the image just like when you quote directly or indirectly. Not citing an image even in the case of owning it yourself will result in the reader thinking that you may have stolen it from the internet. Just because a photo or graphic is on the internet doesn't mean that it's for the taking; any image is automatically copyrighted by the owner as soon as they produce it (e.g., you own the copyright to all the photos you take on your smartphone). Whether or not you can download and use images from the internet depends on both its copyright status and your purpose for using it. According to the U. S. Copyright Office, "Fair USE" allows the user to use copyrighted material without a license with certain restrictions (see "[More Information on Fair Use](#)"), but contacting the owner and asking permission is still the safest course of action. Next safest is to ask your librarian if your use of an image in whatever circumstances might be considered fair.

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

- Centered on the page and appropriately sized given its resolution (do not make low-resolution, pixelated

images large), dimensions, and relative importance

- Labeled immediately below with a figure number given in a consecutive order along with other images in your document
- Described briefly with a caption that also serves as the image’s title
- Attributed with original title, ownership, and retrieval information, including the URL if found online, as well as copyright status information, such as “Copyright 2007 by Larissa Sayer. Printed with permission” ([Thompson, 2017](#)).

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



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

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



Source: “Algonquines” (2008)

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

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

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

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

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

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



FIGURE 1. ALGONQUIN COUPLE [4]

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

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

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

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

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

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

Key Takeaway



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

Exercise



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

References

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CHAPTER 4: THE WRITING PROCESS—DRAFTING

Sumita Roy

Chapter Learning Objectives

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

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

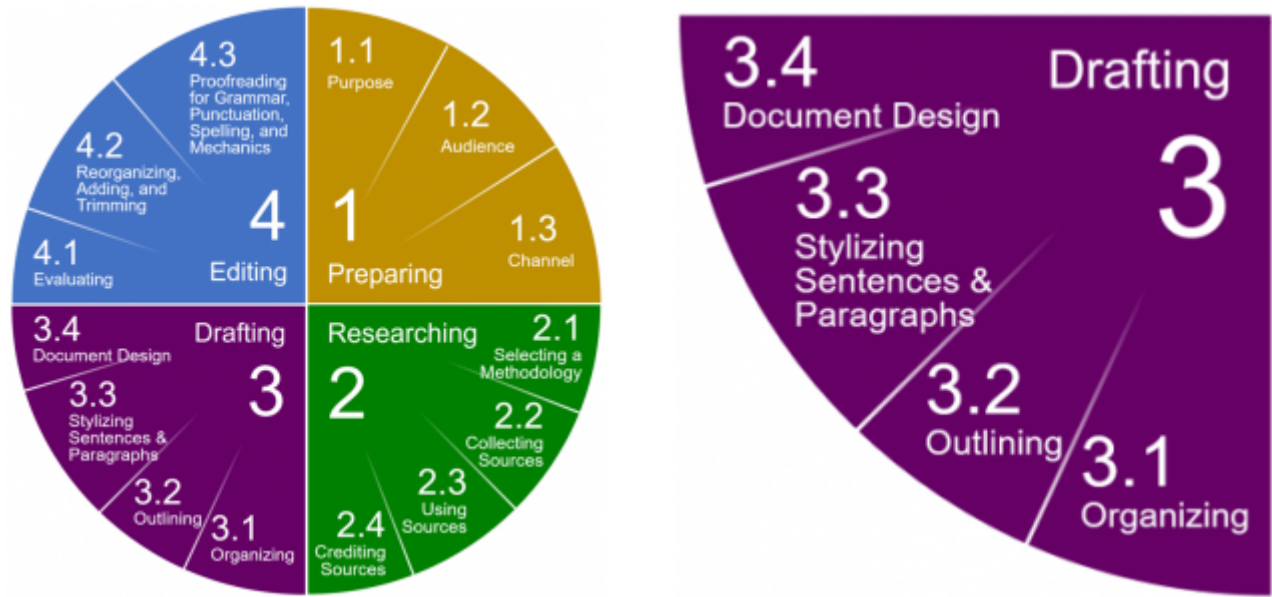


Figure 4: The four-stage writing process and stage 3 breakdown

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

4.1: Choosing an Organizational Pattern

Section 4.1 Learning Objectives



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

The shape of your message depends on the purpose you set out to achieve, so a clearly formulated purpose must be kept in mind throughout the writing process. Whether your purpose is to inform, instruct, persuade, or entertain, structuring your message according to set patterns associated with each purpose helps achieve

those goals. Without those familiar structures guiding your reader toward the intended effect, your reader can get lost and confused, perhaps reflecting the confusion in your own mind if your thoughts aren't clearly focused and organized enough themselves. Or perhaps your message is crystal clear in your own mind, but you articulate it in an unstructured way that assumes your reader sees what you think is an obvious main point. Either way, miscommunication results because your point gets lost in the noise. Lucky for us, we have standard patterns of organization to structure our thoughts and messages to make them understandable to our audiences.

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

1. Attention-grabbing **opening**

- The job of the opening is to hook the reader in to keep reading, capturing their attention with a major personal takeaway (answering the reader's question "What's in it for me?") or the main point (thesis) of the message. In longer messages, the opening includes an introduction that establishes the frame in which the reader can understand everything that follows.
- This accommodates the **primacy effect** in psychology, which is that first impressions tend to stick in our long-term memory more than what follows ([Baddeley, 2000, p. 79](#)), whether those impressions are of the people we meet or the things we read. You probably remember what a recently made friend at college looked like and said the first time you met them, for instance, despite that happening weeks or even months ago. Likewise, you will recall the first few items you read in a list of words better than those in the middle. This effect makes the first sentence you write in a paragraph or the first paragraph you write in a longer message crucial because it will be what your reader remembers most and the anchor for their understanding of the rest. Because of the way our minds work, your first sentence and paragraph must represent the overall message clearly.

2. Detail-packed **body**

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

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

- Our memory typically blurs these details; thus writing notes for future reference is important. You don’t recall the specifics of *every* interaction with your closest friend in the days, months, and years between the strong first impression they made on you and your most recent memory of them, but those interactions were all important for keeping that relationship. Likewise, the message body is a collection of important subpoints in support of the main point, as well as transitional elements that keep the message coherent and plot a course toward its completion.

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

- The closing completes the coverage of the topic and may also point to what’s next, either by bridging to the next message unit (e.g., the concluding sentence of a paragraph establishes a connection to the topic of the next paragraph) or by offering cues to what action should follow the message (e.g., what the reader is supposed to do in response to a letter, such as reply by a certain date).
- Depending on the size, type, and organizational structure of the message, the closing may also offer a concluding summary of the major subpoints made in the body to ensure that the purpose of the message has been achieved. In a persuasive message, for instance, this summary helps prove the opening thesis by confirming that the body of evidence and argument supported it convincingly.
- The closing appeals to what psychologists call the **recency effect**, which is that, after first impressions, last impressions stick out because, after the message concludes, we carry them in our short-term memory more clearly than what came before ([Baddeley, 2000, p. 79](#)). Just as you probably remember your most recent interaction with your best friend—what they were wearing, saying, feeling, etc.—so you remember well how a message ends.

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

- [4.1.1: Direct Messages](#)
- [4.1.2: Indirect Messages](#)
- [4.1.3: Organizing Principles](#)

4.1.1: Direct Messages

In this method, the writer adopts the direct approach of frontloading the main point, which means getting right to the point and not wasting precious time. In college and in professional situations, no one wants to read or write more than they have to when figuring out a message’s meaning, so everybody wins when you open with the main point or thesis and follow with details in the message body. If it takes you a while before you find your own point in the process of writing, leaving it at the end where you finally discovered what your point was or burying it somewhere in the middle will frustrate your reader by forcing them to go looking for it. If you don’t move that main point by copying, cutting, and pasting it at the very beginning, you risk frustrating your busy reader. Leaving out the main point because it’s obvious to you—though it isn’t at all to the reader coming to the topic for the first time—is another common writing error. The writer who frontloads their message, on the other hand, finds themselves in their readers’ good graces right away for making their meaning clear upfront, freeing up readers to move quickly through the rest of the document.

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

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

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

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

Choosing an Organizational Approach in the Writing Process

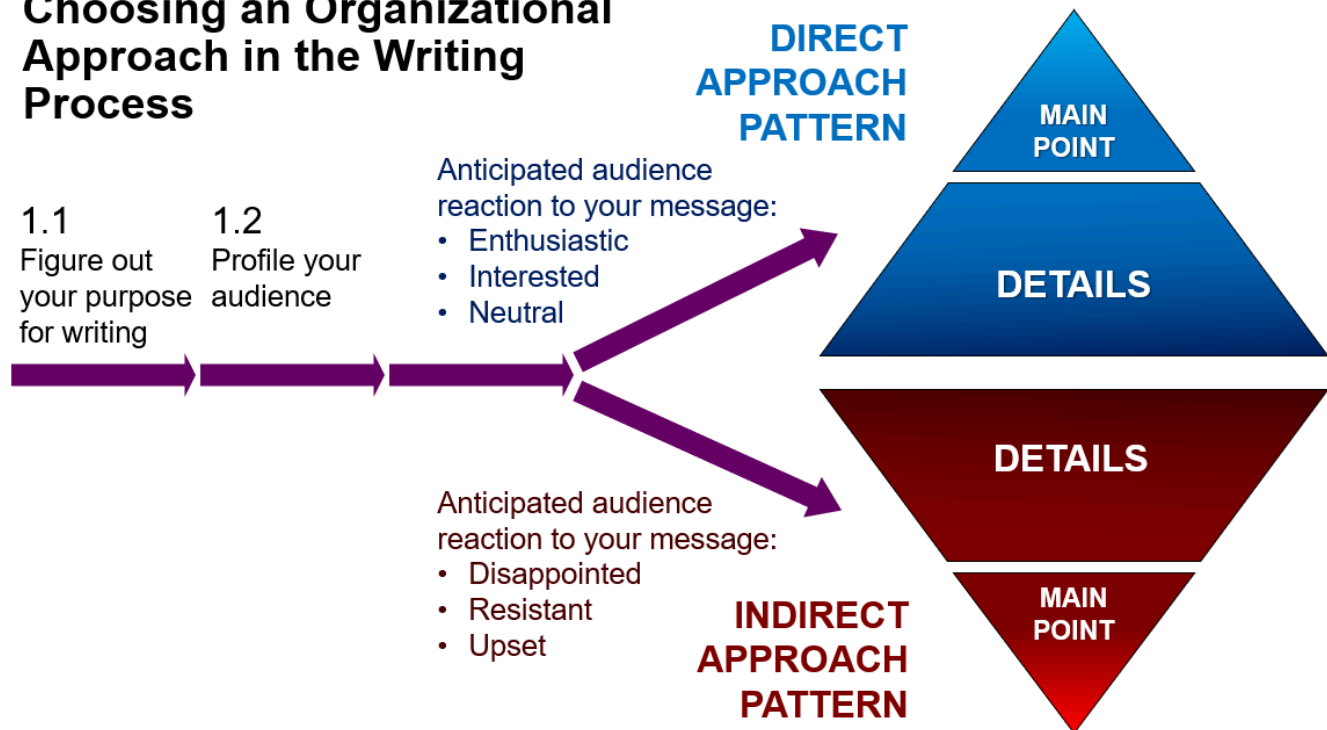


Figure 4.11: The two main business writing organizing patterns and when they should be used (Business Communications, 2019)

4.1.2: Indirect Messages

While the direct approach leads with the main point, the indirect approach buries it deeper in the message when you expect that your reader will be resistant to it, displeased with it, upset or shocked by it, or even hostile toward it. In such cases, the direct approach would come off as overly blunt, tactless, and even cruel by hitting the reader over the head with it in the opening. The goal of indirect messages is not to deceive the reader nor

make a game of finding the main point but instead to use the opening and some of the message body to ease the reader toward an unwanted or upsetting message by framing it in such a way that the reader becomes interested enough to read the whole message and is in the proper mindset for following through on it. This organizational pattern is ideal for two main types of messages: those delivering bad news or addressing a sensitive subject and those requiring persuasion, such as marketing messages pitching a product, a service, or even an idea.

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

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

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

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

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

Delaying the bad news till the third part of the message manages to soften the blow by surrounding it with positive or agreeable information that keeps the audience reading so that they miss neither the bad news nor the rest of the information they need to understand it. If a doctor opened by saying “You’ve got cancer and probably have six months to live,” the patient would probably be reeling so much in hopelessness from the death-sentence blow that they wouldn’t be in the proper frame of mind to hear important follow-up

information about life-extending treatment options. If an explanation of those options preceded the bad news, however, the patient would probably walk away with a more hopeful feeling of being able to beat the cancer and survive. Framing is everything when delivering bad news.

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

Table 4.1.2: Comparison of Direct and Indirect Messages

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

Here we can see at first glance that the indirect message is longer because it takes more care to frame and justify the bad news, starting with an opening that attempts to win over the reader’s agreement by appealing to their sense of reason. In the direct approach, the bad news is delivered concisely in blunt words such as “cutting” and “shutting,” which get the point across economically but without tact. The indirect approach, however, makes the bad news sound quite good—at least to shareholders—with positive words like “improve,” “streamlining,” and “strengthening.” The good news that frames the bad news makes the action sound more acceptable. The combination of careful word choices and the order in which the message unfolds determines how well it is received, understood, and remembered, as we shall see when we consider further examples of persuasive and bad-news messages later in Chapters 6 and 7.

4.1.3: Organizing Principles

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

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

- Introduce the product or service with a **problem-solution** argument on the home page

- Include a history of the company using the **chronological** form as well as the journalistic **5W+H** (who, what, where, when, why, and how) breakdown on the *About* page; you may also include short biographies of key staff
- Use technical descriptions and a **comparison-contrast** structure for product or service explanations that distinguish what you offer from your competitors
- Provide short research articles or essays on newsworthy topics related to your business in the **general-to-specific** pattern on the *Blog* page
- Provide point-pattern questions and answers on the *FAQ* page, such as the **pros and cons** of getting a snow-removal service in answer to the question of whether to pay someone to do it for you
- Provide **instructions** for setting up service on the *Contact* page

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

Table 4.1.3: Ten Common Organizing Principles

Organizing Principle**Structure & Use****Example**

1. Chronology & 5W+H

- Linear narrative from beginning to end, including past, present, and possibly future, as well as the who, what, where, when, why, and how of the story
- For historical accounts, incident reports, and biographies

Wolfe Landscaping & Snowblowing began when founder Robert Wolfe realized in 1993 that there was a huge demand for reliable summer lawn care and winter snow removal when it seemed that the few other available services were letting their customers down. Wolfe began operations with three snow-blowing vehicles in the Bridlewood community of Kanata and expanded to include the rest of Kanata and Stittsville throughout the 1990s.

WLS continued its eastward expansion throughout the 2000s and now covers the entire capital region as far east as Orleans, plus Barrhaven in the south, with 64 snow-blowing vehicles out on the road at any one time. WLS recently added real-time GPS tracking to its app service and plans to continue expanding its service area to the rural west, south, and east of Ottawa throughout the 2020s.

2. Comparison & Contrast

- Point-by-point account of the similarities between two or more things, followed by a similarly structured account of their differences
- For descriptive analysis of two or more somehow related things

Wolfe Snowblowing goes above and beyond what its competitors offer. While all snow-blowing services will send a loader-mount snow blower (LMSB) to your house to clear your driveway after a big snowfall, Wolfe's LMSBs closely follow the city plow to clear your driveway and the snow bank made by the city plow in front of it, as well as the curbside area in front of your house so you still have street parking.

If you go with the “Don't Lift a Finger This Winter” deluxe package, Wolfe will additionally clear and salt your walkway, stairs, and doorstep. With base service pricing 10% cheaper than other companies, going with Wolfe for your snow-removal needs is a no-brainer.

3. Pros & Cons

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

Why would you want a snow-removal service?

Advantages include:

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

The disadvantages of other snow-removal services include:

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

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

4. Problem & Solution

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

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

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

5. Cause & Effect

- Detailed description of the connection between two or more events, actions, or things to show how they work
- For an analysis of the causal connection between things

As soon as snow appears in the weather forecast, Wolfe Landscaping & Snowblowing reserves its crew of dedicated snow blowers for 24-hour snow removal. When accumulation reaches 5 cm in your area, our fleet deploys to remove snow from the driveways of all registered customers before the city plows get there. Once the city plow clears your street, a WLS snow blower returns shortly after to clear the snow bank formed by the city plow at the end of your driveway.

6. Process & Procedure

- Numbered list describing steps in a chronological sequence of actions toward a goal
- For an analysis of how something works or instructions for performing a certain task

Ordering our snow removal service is as easy as 1 2 3:

1. Call 1-800-555-SNOW or email us at info@wolfelandscaping&snow
2. Let us know your address and driveway size (can it fit only one parked car, two end-to-end or side-by-side, four, etc.?)
3. Pay by credit card over the phone or via our secure website, and we will come by to plant driveway markers within the week. That way, our snow blowers will be able to respect your driveway boundaries throughout the winter clearing season.

7. General to Specific

- Starts with the bigger picture as context before narrowing the focus to something very specific
- For an in-depth analysis or explanation of a topic

Wolfe Landscaping & Snowblowing provides a reliable snow-removal service throughout the winter. We've got you covered for any snowfall of 5 cm or more between November 1st and April 15th. Once accumulation reaches 5 cm at any time day or night, weekday or weekend, holiday or not, we send out our fleet of snow blowers to cover neighborhood routes, going house-by-house to service registered customers. At each house, a loader-mount snow blower scrapes your driveway and redistributes the snow evenly across your front yard in less than five minutes.

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

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

Key Takeaway



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

Exercises



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

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4.2: Outlining Your Message

Section 4.2 Learning Objectives



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

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

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

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

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

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

Message Outline

1. Interested
2. Our details
 - a. address
 - b. driveway
3. Questions:
 - a. prepaid cost vs. one-time?
 - b. discounts?

Email Message Draft

Greetings! I am interested in your snow-removal service this winter.

We're at 5034 Tofino Crescent, and our driveway can fit four cars, so how much would that come to for the prepaid service?

Alternatively, if we decide to do the snow removal ourselves for most of the winter but are in a jam at some point, is it possible to call you for one-time snow removal? How much would that be? Also, do you offer any discounts for first-time customers?

Warm regards,
Christine Cook

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

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

Table 4.2b: Outline Possibilities Based on Organizing Principles

Organizing Principle**Outline**

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

As we shall see later on, outlining is key to organizing other projects such as presentations. If your task is to do a 20-minute presentation, preparing for it involves outlining your topic so that you can plot out the full scope of your speech, then fleshing out that outline into a coherent script with smooth transitions linking each point and subpoint. If it takes you 15 minutes to read that first version of the script out loud, then you simply add a third more material in the form of points in areas that need more development in your outline, then script them out into five more minutes of speech. But if it takes a half hour to read the first version of the script, then you know that you need to pare it down, chopping about a third of its length. Outlining and scripting prior to building a PowerPoint for a 20-minute presentation that would take you a half hour to present would save you the time of making slides for material that would have to be cut out anyway. In this way, outlining keeps you on track to prevent wasted efforts.

Key Takeaway



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

Exercises



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

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4.3: Forming Effective Sentences

Section 4.3 Learning Objectives



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

Once you've put words on the screen with research material and outlined the shape of your content with point-

form notes, building around that research and fleshing out those notes into correct English sentences should be quick and dirty composition—“quick” because speed-typing helps get your thoughts down almost as soon as they occur to you and “dirty” because it’s fine if those typed-out thoughts are garbage writing rife with errors. A talented few might be able to think and draft in perfectly correct sentences, but that’s not our goal at this stage.

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

Fashioning effective sentences requires an understanding of sentence structure. Now, the eyes of many native English speakers glaze over as soon as English grammar terminology rears its head. But think of it this way: to survive as a human being, you must take care of your health, which means occasionally going to the doctor for help with the injuries and conditions that inevitably afflict you; to understand these, you listen to your doctor’s explanations of how they work in your body, and you add to your vocabulary anatomical terms and processes—words you didn’t need for those processes to function when you were healthy. Now that you need to work to improve your health, however, you need that technical understanding to know how exactly to improve. It’s likewise worth learning grammar terminology because writing mistakes undermine your professionalism, and you won’t know how to write correctly, such as where to put punctuation and where not to, if you don’t know basic sentence structure and the terminology we use to describe it. Trust me, we’ll be using it often throughout this chapter and the next. Many ESL speakers who say “I don’t know what the rule’s called, but I know what looks right” actually *can* improve their writing if they understand more about how it works. Pay close attention throughout the following introductory lesson on sentence structure and variety especially if you’re not entirely confident in your knowledge of grammar.

- [4.3.1: Four Sentence Moods](#)
- [4.3.2: Four Sentence Varieties](#)
- [4.3.3: Sentence Length](#)
- [4.3.4: Active- vs. Passive-voice Sentences](#)

4.3.1: Sentence Structure and the Four Moods

Four basic sentence moods (or types) help you express whatever you want in English, as detailed in Table 4.3.1

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

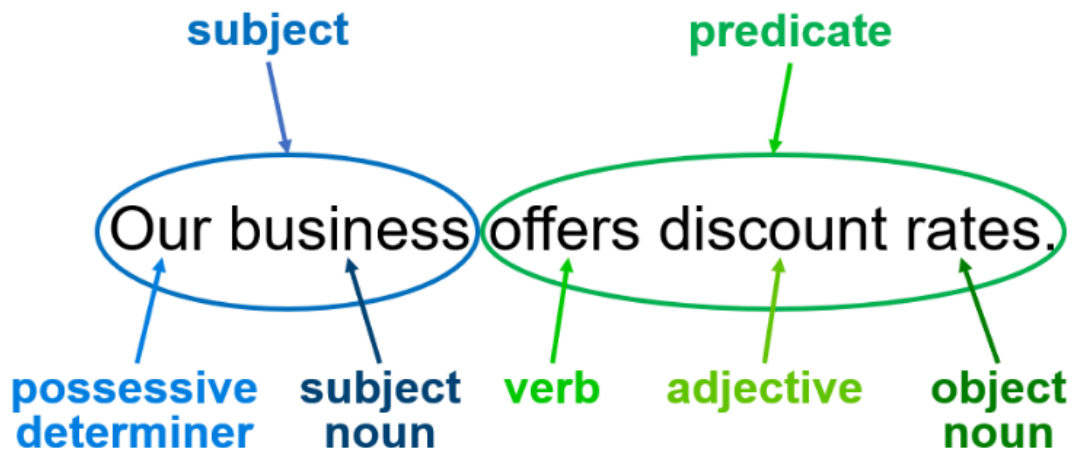


Figure 4.3.1: Breakdown of a simple declarative sentence into its component parts of speech

Our business offers discount rates

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

Subjects and predicates can also grow with the addition of other types of phrases (e.g., prepositional, infinitive, participial, gerund phrases) to clarify meaning even further. As large as a sentence can get with the addition of all these parts, however, you should always be able to spot the core noun of the subject and main verb of

the predicate. Sentences that omit either are called fragments and should be avoided because they confuse the reader, being unclear about who’s doing what.

Table 4.3.1: Four Sentence Moods

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

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

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

4.3.2: Four Sentence Varieties

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

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

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

Table 4.3.2a: Coordinating and Subordinating Conjunctions

Coordinating Conjunctions

for
and
nor
but
or
yet
so

Subordinating Conjunctions

After
Although
As
As if
As long as
As though
Because
Before
Even if
Even though
If
If only
In order that
Now that
Once
Provided that
Rather than
Since
So that
Than
That
Though
Till
Unless
Until
When
Whenever
Where
Whereas
Wherever
Whether
While

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

Table 4.3.2b: Four Sentence Varieties

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

4. Compound-complex	<ul style="list-style-type: none"> • Combines compound and complex sentences, requiring at least two independent clauses and one dependent clause • Use occasionally because these can be long sentences 	<p>When we updated our computer systems on the 12th, productivity increased 35% by the end of the week, but the systems needed updating again within the month to restore productivity increases. (31 words)</p> <p><i>Introductory dependent clause + independent clause + independent clause</i></p>
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Combinations of sentence moods and varieties are all possible, so we have many hybrid sentence structures available to express our thoughts. For instance, an introductory subordinate clause can precede an interrogative main clause:

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

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

4.3.3: Sentence Length

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

Sentences in most business documents should average around 25 words, which you may consider your baseline goal for sentence length. There's nothing wrong with sentences shorter than that if they don't sacrifice clarity in achieving conciseness. There's also nothing wrong with writing the odd 40-word sentence if it takes

that many words to express a complete (and probably complex) thought when anything less would again sacrifice clarity. In all cases, however, you must consider your intended audience’s reading abilities.

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

4.3.4: Active- vs. Passive-voice Sentences

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

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

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

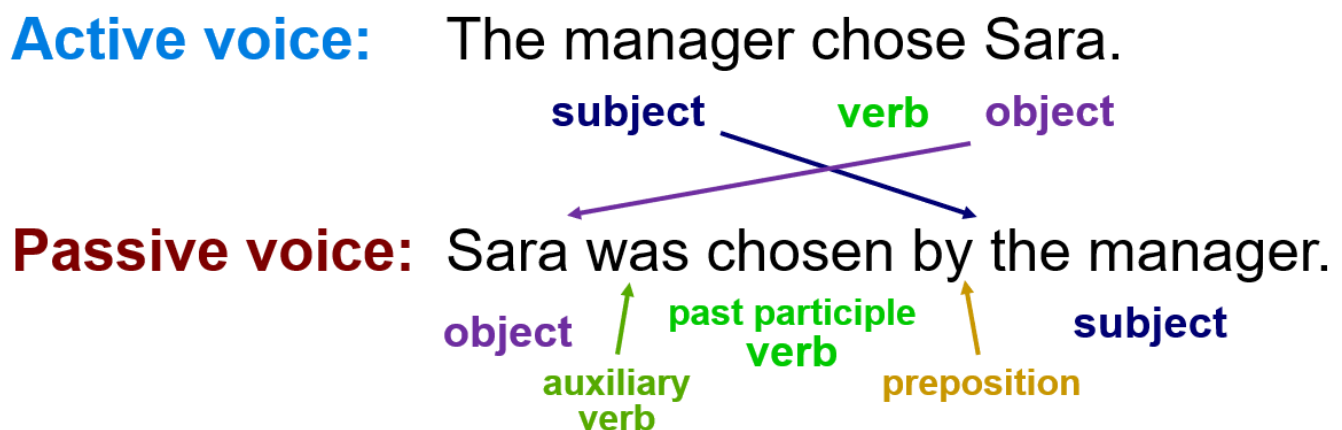


Figure 4.3.4: Comparison of active- and passive-voice sentences

Active Voice: The manager chose Sara

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

Passive Voice: Sara was chosen by the manager.

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

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

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

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

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

- **A form of the verb *to be*** as an **auxiliary (helper) verb** paired with the main verb, usually right before it. The auxiliary verb determines the tense of the main verb:
 - Past forms of *to be*: *was, were*
 - Sara **was** chosen. We **were** chosen.
 - Past perfect form of *to be*: *had been*
 - Sara **had been** chosen.

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

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

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

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

Now, before you fall into the trap of thinking that this is some kind of advanced writing technique just

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

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

1. **Emphasize the object of the verb** (the person, place, or thing acted upon) for variety amid a majority of AV sentences that prioritize the subject. In the Table 4.3.4 example, saying “Sara was chosen” in the PV focuses the audience’s attention on the object, Sara, by putting her first, rather than on the manager as the doer of the action. Indeed, the manager’s role in the choosing might be so irrelevant that they can exit the sentence altogether, perhaps because the context of the conversation makes it so obvious that it goes without saying.
2. **Hide the doer of the action.** If Sara was chosen for a promotion over her colleagues, saying “Sara was chosen” in the PV focuses on her accomplishment while drawing attention entirely away from the manager. Perhaps you don’t want the people who were passed up for promotion to know who exactly they should direct their resentment at. Using the PV in this case makes the choice of Sara sound objective, like anyone would have chosen her for this promotion because she really deserved it. PV is often used in this way as a public relations strategy to control the message. This use of the PV can be quite problematic when used as a cover for the doer (see #3 below), however, as we see in the rhetoric surrounding gender violence. Rephrasing a sentence like *John beat Mary* as *Mary was beaten* shifts the focus of violence to the victim rather than the perpetrator by dropping the latter from the conversation altogether. We need to target the perpetrators of gender violence (mainly men and boys), however, as the root of the problem if we hope to reduce and eliminate the harm done to women and girls.
3. **Avoid accepting responsibility.** In answer to an irate parent’s question “Who broke this glass?” a fibbing two-year-old might say, “It was just broken when I got here.” We learn early—long before we even know how to read and write—how to cover up for our mistakes with this trick of language. Even dodging politicians will say, “Clearly, mistakes were made,” which makes it sound as if the blunders were made by unknown actors rather than the policy-makers themselves, as the more honest alternative in the AV, “Clearly, we made mistakes,” would make clear ([Benen, 2015](#)).
4. Indicate that **you don’t actually know who the doer is.** Saying “A charitable donation was left in our mailbox” in the PV is stylistically appropriate if you want to focus on the donation and don’t know who left it, whereas “Someone left a charitable donation in our mailbox” is an AV equivalent that focuses

more on the anonymity of the benefactor.

5. **State a general rule or principle** without singling anyone out. Declaring that “Returns must be accompanied with a receipt in order to receive a refund” in the PV is a more tactful, less authoritarian and negative way of saying “You can’t get a refund without a receipt” in the AV.
6. Follow a stylistic preference for PV sentences in some **scientific writing**. Saying “The titration was performed” or “a lean approach is recommended” sounds more objective—albeit a little unnatural, especially when nearly every sentence is in the PV rather than the 5–10% we are used to in conversation—compared with the more subjective-sounding AV statements “I performed the titration” or “I recommend a lean approach.” (See the following paragraph for a solution to this predicament.)

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

We will return to the issue of AV vs. PV in Chapter 5 on editing for style, but if you train yourself to write in the AV rather than PV as a habit and only use PV when it’s justified by strategic advantage or necessity, you can save yourself time in both the drafting and editing stages of the writing process. For further explanation of the AV vs. PV and example sentences, see:

- [Active versus Passive Voice](#) (Purdue OWL)
- [Passive Voice: When to Use It and When to Avoid It](#) (Corson & Smollett, 2007)

Key Takeaway



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

Exercises



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

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4.4: Forming Effective Paragraphs

Section 4.4 Learning Objectives



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

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

- [4.4.1: Paragraph Size and Structure](#)
- [4.4.2: Paragraph Coherence](#)

4.4.1: Paragraph Size and Structure

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

1. Topic sentence
2. Body or development sentences
3. Transitional or concluding sentence

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

1. Topic Sentence

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

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

+ v) at the top of the paragraph so it does what a topic paragraph should do: preview what follows with an at-a-glance summary.

2. Body or Development Sentences

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

3. Transitional or Concluding Sentence

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

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

4.4.2: Paragraph Coherence

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

Like the organizational principles we explored above, we have a repertoire of recognizable pronouns, transitional expressions, and particular words or phrases that connect ideas in our writing so readers can easily follow our trains of thought. **Pronouns** such as those in Table 4.4.2a below allow us to represent nouns, phrases, and even whole sentences that came before (called antecedents) without repeating them word for word—as long as the antecedents are clear ([Pronouns](#), Purdue OWL).

Table 4.4.2a: Pronoun Types and Examples

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

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

Effectively incorporating transitions often depends upon your ability to identify words or phrases that will indicate for the reader the kind of logical relationships or connections you want to convey. View the chart below or check out [this website](#) to see how to use different transitions and conjunctions:

Table 4.4.2b: Meaning and Usage of Commons Transitions

Logical Relation			Example Sentences
Addition	Transitions	moreover furthermore additionally in addition	Culture varies from place to place; furthermore, it varies over time.
	Conjunctions	and	People from different cultures often have different points of view, and these differences can result in miscommunication.
Example	Transitions	for example for instance to illustrate to demonstrate	High-context cultures place a lot of emphasis on social status. For example, an elder in Japan might expect a young person to serve him tea using both hands as a gesture of respect
Cause	Transitions	therefore as a result on account of this because of this	Culture is dynamic and constantly changing. Therefore, the norms of one generation might differ from the norms of another generation even within the same culture.
	Conjunctions	since because so	Because culture is learned, members of a given society seldom question the culture of which they are a part.
Contrast or Exception	Transitions	however on the other hand alternatively instead nevertheless	Low-context cultures prefer direct communication. However, high-context cultures can perceive directness as being rude.
	Conjunctions	but yet although even though	Although generalizations can lead to bias, having some method of categorizing cultures is helpful to understand how cultures differ from each other.
Comparison	Transitions	likewise similarly in the same manner	People who are good listeners are often good communicators. Similarly, people who pay attention to cultural norms have greater success when communicating between cultures.
Time	Transitions	then next previously finally	There are now six recognized dimensions of culture. Previously, there had been only five.
	Conjunctions	when while	When communicating across cultures, you should remember that cultural difference affects how your message is perceived.

[Transition Meaning Usage Chart](#) by Confederation College Communications Department and Paterson Library Commons is licensed [CC BY-NC-SA](#).

Key Takeaway



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

Exercises



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

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4.5: Standard Business Style

Section 4.5 Learning Objectives



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

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

- [4.5.1: The Formality Spectrum](#)
- [4.5.2: Removing Biases in Language](#)
- [4.5.3: The 6 Cs of Style](#)

4.5.1: The Formality Spectrum

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

1. Formal Style in Writing

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

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

2. Casual Style in Writing

Your ability to gear down to a more casual style is necessary in any situation where you're communicating with familiar people generally on your level and when a personable, conversational tone is appreciated, such as when writing to someone with basic reading skills. In a routine email to a colleague, for instance, you would use informal vocabulary, including conversational expressions such as “a lot” instead of the more formal “plenty.” You would also use contractions, such as *it's* for *it is* or *it has*, *would've* for *would have*, and *you're* for *you are*. Two paragraphs up from this one, the effort to model a more formal style included avoiding contractions such as *you've* in the first sentence, *it's* in the third, and *won't* and *they'll* in the last, which requires a determined

effort because you must fully spell out each word. While not a sign of disrespect, the more relaxed approach says to the reader, “Hey, we’re all friends here, so let’s not try so hard to impress each other.” When an upper-level manager wants to be liked rather than feared, they’ll permit a more casual style of communication in their employees’ interactions with them, assuming that doing so achieves collegiality rather than disrespect.

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

3. Slang Style in Writing

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

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

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

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

Second, the whole point of slang is to be incomprehensible to most people, which is the opposite of the goal of communication discussed above, and especially in situations where you want to be understood by a general audience. As a deviation from accepted standards of “proper” vocabulary, grammar, punctuation, syntax, etc., slang is entirely appropriate in adolescent and subculture communication because it is meant to score points

with an in-group that sets itself apart from the rest of polite society. Its set of codewords and nonstandard grammar is meant to confuse anyone not part of that in-group and would sound ridiculous if anyone else even tried to speak it, as when parents try to level with their teens in teen vernacular. Obviously, if slang is used in professional contexts where audiences just don't know how to accurately translate the expressions, or they don't even know about [Urban Dictionary](#) to help translate “a buck fiddy” in the above example as \$150 rather than \$1.50, the ensuing confusion results in all the expensive problems brought on by miscommunication.

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

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

Test Your Understanding



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://louis.pressbooks.pub/businessprofessionalcomm/?p=520#h5p-42>

4. Emojis in Professional Writing?

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

However, the lack of precision in emojis can also cause confusion, as they may be interpreted differently if the social and cultural context of the receiver differs enough from that of the sender ([Pringle, 2018](#)), not to mention differences in their emotional states. This means that emojis aren't as universal as some claim they are, especially when used by correspondents who speak different languages ([Caramela, 2018](#)). Even between those who speak the same language, a smiley-face emoji added to a lightly insulting text message might be intended as a light-hearted jab at the receiver by the sender but might be read as a deeply cutting passive-aggressive dig by the receiver. The same text message said in person, however, comes with a multitude of nonverbal cues (facial expressions, eye



movements, body movements, timing, voice intonation, volume, speed, etc.) that help the listener determine the exact intentions of the speaker—meanings that can't possibly be covered by a little 2D cartoon character.

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

communication, some caution and good judgment, as well as attention to notable uses and abuses that show up in the news or company policy directives, can help you avoid making potentially disastrous mistakes.

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

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

However, in any of the above cases, you would probably be safe to mirror the use of emojis after your correspondent gives you the greenlight by using them first ([Caramela, 2018](#)). Yes, emojis lighten the mood and help with bonding among workplace colleagues. If used excessively as part of a larger breakdown of decorum, they suggest a troubling lack of professionalism. Managers especially should refrain from emoji use to set an example of impeccable decorum in communications to the employees they supervise.

4.5.2: Removing Biases in Language

In professional writing, it is important to keep language free from biases based on gender, race, color, disability, ethnicity, and economic and educational backgrounds. Historically, business writing catered to the mainstream elite, which disregarded audience based on color, gender, ethnicity, and disability. In recent times, corporations and academia have become more sensitive in using language that marginalizes a group of people. In fact, younger companies—most especially companies related to Informational technology will reject an application for a job if the writer's language reveals a bias toward any of these groups. Popularly labeled as being “politically correct,” it is prudent for all business and professional writers to adopt a writing style that is free of any kind of bias. Using bias-free language shows empathy and improves business.

Examples of bias-free writing would be as follows:

Gender Bias: A Chair or a Chairperson rather than a Chairman. A Chair can be either a man or a woman. Traditionally, the title was used for a male; however, the current use reflects merely the title rather than the gender. Similarly, a person could be referred to as a soldier or an engineer regardless of the person's gender.

Race/Color Bias: An African American rather than a Black person.

Disability Bias: A visually challenged student rather than a blind one.

Ethnicity Bias: A Chinese rather than a generic Asian person.

Removing biases from business language is not only professional but humane. It reveals inclusion of and respect to groups of people who have been marginalized in history.

Test Your Understanding



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<https://louis.pressbooks.pub/businessprofessionalcomm/?p=520#h5p-41>

4.5.3: The 6 Cs of Style

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

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

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

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

1. Clarity

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

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

- Instead of saying “a change in the budget,” “a 10% budget cut” makes clear to the reader that they’ll have to make do with nine of what they had ten of before.
- Instead of saying that a home’s annual average basement radon level is a cause for concern, be specific in saying that it is 5.0 pCi/L (for picocuries per liter of air) so that the reader knows how far above public health guidelines it is and therefore the extent of remedial action required.
- Instead of saying that you’re rescheduling it to Thursday, be clear on what’s being rescheduled, what the old and new calendar dates and times are, and if the location is changing, too. If you say that it’s the 3 p.m. Friday meeting on May 25th being moved to 9 a.m. Thursday, May 31st, in room B349, participants know exactly which meeting to move where in their email program’s calendar feature.
- Always spell out months so that you don’t confuse your reader with dates in the “dd/mm/yy” or “mm/dd/yy” style; for instance, “4/5/18,” could be read as either April 5th or May 4th, 2018, depending on whether the author personally prefers one date form over the other or follows a company style in lieu of any universally accepted date style.
- Instead of saying at the end of an email, “Let’s meet to discuss” and leaving the ball in your correspondent’s court to figure out a time and place, prevent the inevitable time-consuming back-and-forth by giving your available meeting time options (e.g., 9–10 a.m. Thursday, May 31st; 2–3 p.m. Friday, June 1st; etc.) in a bulleted list and suggesting a familiar place so that all your correspondent needs to do is reply once with their preferred meeting time from among those menu options and confirmation on the location.
- Instead of saying “You’ve got a message,” being clear that Tia Sherman from the Internal Revenue

Service left a voicemail message at 12:48 p.m. on Thursday, February 8th gives you the precise detail that you need to act on that information.

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

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

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

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

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

2. Conciseness

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

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

3. Coherence and Completeness

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

4. Correctness

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

5. Courtesy

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

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

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

Now, if you were the client reading this slightly angry-sounding, accusatory order, you would likely feel a little embarrassed and maybe even a little upset by the edgy, pushy tone coming through in negative words like *forgot*, *do that*, *a.s.a.p.*, and *can’t*. That feeling wouldn’t sit well with you, and you will begin to build an

aversion to that person and the organization they represent. (If this isn't the first time you forgot to sign a contract for them, however, the demanding tone would be more justified or at least more understandable.) Now imagine you read instead a message that says, with reference to the very same situation, the following:

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

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

a. Use the "You" View

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

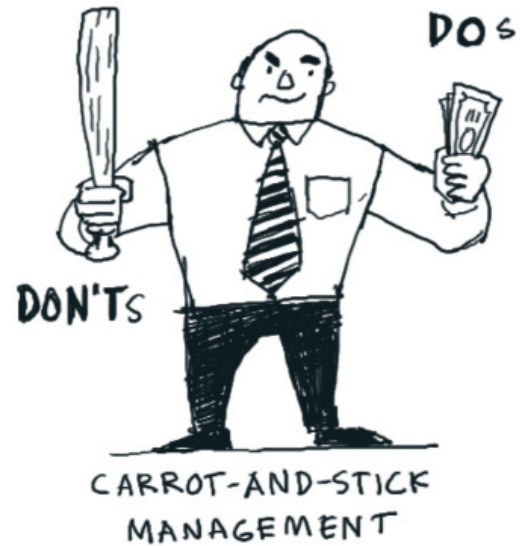
The trick to achieving an audience-oriented message is to catch yourself whenever you begin writing from your perspective with first-person personal pronouns like *I* and *my* and immediately flip the sentence around to say *you* and *your* instead. Simply changing the pronouns isn't enough, though;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

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

b. Prioritize Audience Benefits

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

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



c. Focus on Future Positive Outcomes

Focusing on what can be done and improvement sits better with readers than focusing on what can't be done and criticism. In the above case, the initial rendering of the problem focused on blaming the reader for what they did wrong and on the impasse of the situation with the contract. The improved version corrects this because it skips the fault-finding criticism and instead moves directly to what good things will happen if the reader does what needs to be done. The reader of the second sentence will associate you with the feeling of being pleased by the taste of the carrot rather than smarting from the whack of the stick.

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

- awful

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

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

On its own, translating a single sentence like the one exemplified above will likely not have a lasting effect; over time, however, a habitual focus on negative outcomes and use of negative language will result in people

developing a dislike for dealing with you and, by association, the company you represent. If you make a habit of writing in positive words most of the time and use negative words only in situations where they're necessary, on the other hand, you stand a good chance of being well liked. People will enjoy working with or for you, which ensures continued positive relations as well as opens the door to other opportunities.

6. Convincing and Confident

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

- almost
- approximately
- basically
- blah
- close to
- could (have)
- -esque
- -ish
- kind of / kinda
- may/maybe
- meh
- might
- probably
- roundabout
- somewhat
- sort of / sorta
- should (have)
- thereabouts
- usually
- we'll see
- whatever
- whenever
- whichever
- -y (e.g., orange-y)

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

Key Takeaway



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

Exercises



1. Assemble a six-Cs scoring rubric for assessing professional writing using the descriptions throughout §4.5.3 above. In the highest-achievement column, list in point form the attributes of each characteristic. In the columns describing lesser and lesser levels of achievement, identify how those expectations can fall apart. For help with the rubric form, you may wish to use [Rubistar's writing rubric template](#).
2. Find examples of past emails or other documents you've written that make you cringe, perhaps even high school essays or reports. Identify instances where they are unclear, unnecessarily longwinded, incoherent (lacking both a clear organizational pattern and transitions that drive the argument along), rife with writing errors, rude, and/or unconvincing. Assess and score those specimens using your six-Cs rubric from Exercise 1 above. Begin to think of how you would improve them.
3. Find a professionally written document, perhaps from a case study in another class. Assess it using the same six-Cs scoring rubric.
4. Speed-write a written assignment that you've been recently assigned in one of the other courses in your program. If you're not fast at typing (or even if you are and want to try something new), you may start by recording your message into your smartphone's or computer's voice recorder app

or program and then transcribe it. Ensure that your style hits five of the six style Cs (clarity, conciseness, coherence, courtesy, and conviction) as you write and most definitely do not correct as you go.

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4.6: Effective Document Design

Section 4.6 Learning Objectives



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

4. Apply the principles of reader-friendly document design to various written formats.

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

- [4.6.1: Titles](#)
- [4.6.2: Headings and Subheadings](#)
- [4.6.3: Font](#)
- [4.6.4: Line Spacing](#)
- [4.6.5: Lists](#)
- [4.6.6: Visual Aids](#)
- [4.6.7: Interactive Elements](#)
- [4.6.8: Balancing Text and Whitespace](#)
- [4.6.9: Making Accessible, ADA-Compliant Documents](#)

4.6.1: Titles

Almost every document that exists as a standalone unit must have a title that accurately represents its contents in a nutshell. It's the first thing a reader looks for to understand what a document is all about and should thus be easily found centered at the top of the first page of any small document and prominently placed on the cover of larger documents. Though some documents represent exceptions to this rule (e.g., business letters lack titles,

and many lack subject lines), any document that brings with it the expectation of a title but omits it confuses the reader. Even emails and memos have titles in the form of subject lines. In whatever document you find it, a title's following characteristics make it essential to your reader's understanding of the whole:

- **Topic summary:** A title is the most concise summary possible of a topic while still making sense. If you glance at a news website or newspaper, for instance, you can get a reasonably good sense of what's going on in the world just by reading the headlines because they are titles that, in as few words as possible, summarize the narratives told in the articles that follow.
- **Conciseness:** Aim for a length in the 2- to 7-word range—something that can be said repeatedly in one short breath. One-word titles are appropriate only for art (e.g., for books, films, songs, albums, etc.), but most other professional documents use a reasonable number of words to give a sense of the topic, albeit streamlined to the point of having no words that don't absolutely need to be there. In scientific papers, titles can be quite long and carry plenty of detail, though you can expect that their audiences will rarely pronounce the full title.
- **Capitalization:** Capitalize the first word no matter what, as well as all major words (nouns, verbs, adjectives, adverbs, pronouns, etc.) thereafter.
 - Don't capitalize prepositions (e.g., *on, to, from, in, out, of*), conjunctions (*and, but, or, for, nor, so, yet*), or articles (*the, a, an*) unless they're the first word of the main title or subtitle (Darling, 2014a, 2014b, 2014c).
 - When including a hyphenated word (i.e., with a compound-modifier hyphen), leave the second word, the one immediately following the hyphen, lowercase (see the first two examples in the titles listed at the end of this subsection).
- **Structure:** Use a noun, verb, or adjective phrase rather than a complete sentence.
 - **Main title:** If your title comes in two parts with a main title and subtitle, the main title establishes the general context of the topic, perhaps with catchy or clever phrasing, and ends with a colon (:) with a single space after it but none before.
 - **Subtitle:** The subtitle follows the main title with a more specific and detailed summary of the document topic.
- **Position:** Center the title at the top of the page and include 1–2 empty lines below it to separate it from the opening text.
- **Typeface:** Use bold typeface to help draw the eye toward the title, as well as color if appropriate.

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

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

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

4.6.2: Headings and Subheadings

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

If your drafting process follows the guide in this chapter, then you would have already drafted your headings and subheadings (and possibly numbering if necessitated by the size of the document) in your outline (see §4.2 above). The drafting process of fleshing out that outline may suggest tweaks to those heading and subheading titles. As titles, headings must be properly phrased and capitalized like main titles (see §4.6.1 above).

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

ADA compliance). Manipulating font sizes in headings and sub-headings indicates the relative hierarchy of information conveyed in a document.

4.6.3: Font

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

1. Font Type

Writers considering typeface must choose between two major style categories depending on how they would like to accommodate their reader. **Serif fonts** like **Times New Roman** and **Garamond** have little perpendicular crossline “feet” or “hands” at the ends of letter strokes, as well as variable thickness in the strokes themselves depending on their horizontal/vertical or curving position, which altogether help readers distinguish between similar letters or combinations of letters, such as *m* and *rn*, which almost look like the same letter in a non-serif font. Serif fonts are ideal for printed documents, especially those with smallish font sizes such as newspapers. Without serifs, **sans serif fonts** like **Arial** (the one used in this textbook) or **Verdana** achieve a more clean and modern look, especially on computer screens where serif fonts appear to wither away at the thin part of the stroke and are thus harder to read. In the appropriate format, all the fonts mentioned above make a document look respectable. **Comic Sans**, on the other hand, is appropriate for documents aimed at children but undermines the credibility of any professional document.

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

Times New Roman

Garamond

Arial

Verdana

Comic Sans

Papyrus

COPPERPLATE

2. Font Size

Size is another important consideration because readers depend on text being an ideal “Goldilocks” size for readability and are frustrated by font sizes that are bigger or smaller than that. In a standard written document, for instance, a 12-point Arial or Times New Roman is the Goldilocks size. If the MS Word default size when you open a blank document is 11-point, it’s worth increasing it for the sake of those who have slight visual impairment. Increasing the size much past 12-point has a similar effect as using the Comic Sans font type: it makes your document appear to be targeting an audience of children. Of course, situations where you want to increase the font size abound, such as for titles on title pages so that the eye is drawn immediately to them and any time readers are required to read at a distance, such as posters on a notice board or presentation slides.

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

3. Font Color

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

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

4. Boldface, Italics, and Underlining

Boldface, *italics*, and underlining serve various purposes in focusing audience attention on certain words.

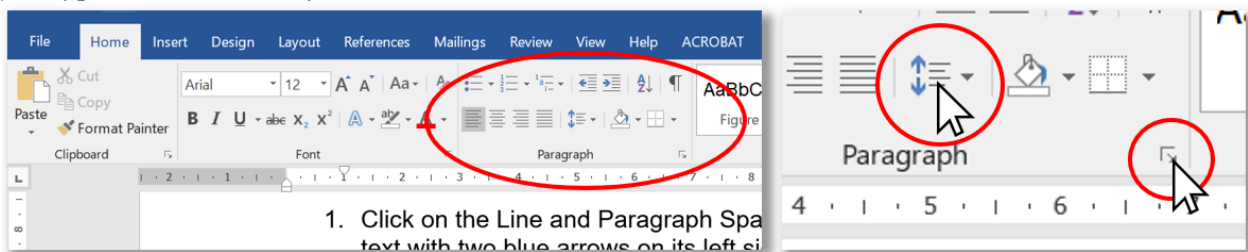
Boldface type is especially helpful in directing audience eyes toward titles, headings, and keywords as you can see at the beginning of this paragraph and throughout this textbook. Highlighting in this way is especially helpful to anyone who is visually impaired in any degree. Of course, overusing boldface undermines its impact, so it should be used sparingly and strategically. Likewise, italics and underlining have very specific purposes that we will look at under the banner of mechanics in Chapter 5.

4.6.4: Line Spacing

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

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

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



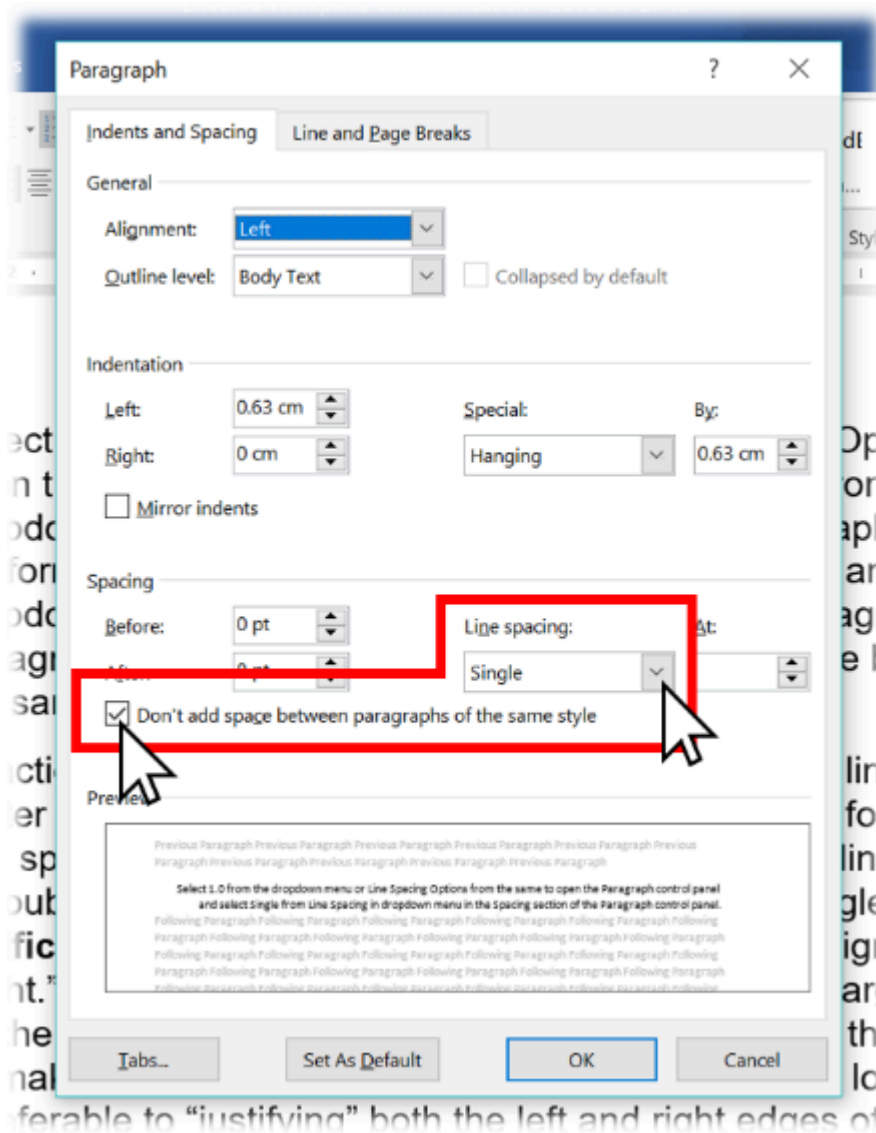


Figure 4.6.4a: Where to click

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

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

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

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

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

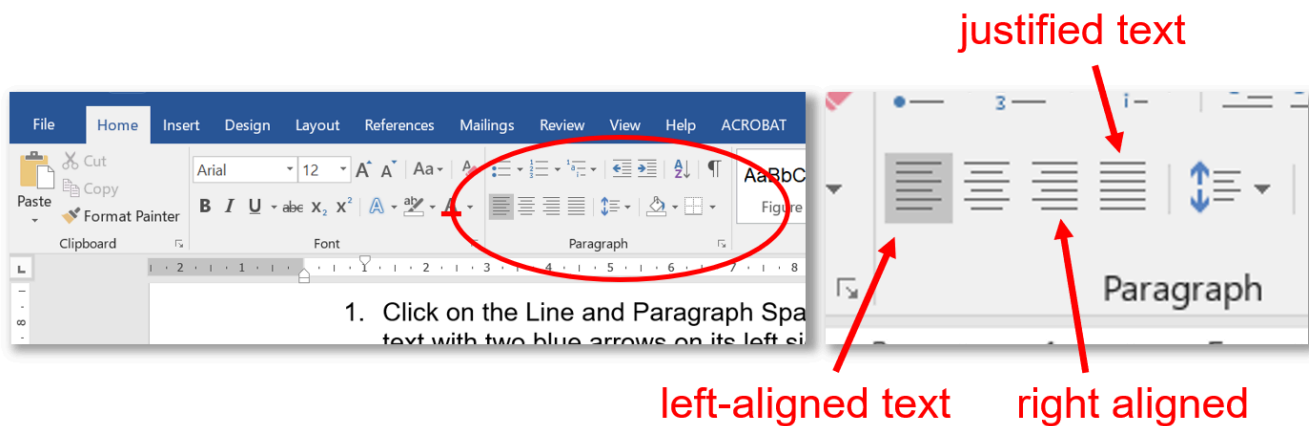


Figure 4.6.4b: Where to click to select text justification or left-aligned (“ragged right”) text in the MS Word Home menu tool ribbon

4.6.5: Lists

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

Use Numbered Lists for:

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

Use Bulleted Lists for:

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

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

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

The need for parallelism extends also to lists within a sentence.

4.6.6: Visual Aids

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

- **Aesthetic considerations:**

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

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

- **Aesthetic guidelines:**
 - Choose images that look like they were produced by professional photographers, illustrators, or graphic designers—the sort you would see in a magazine or professional industry website.
 - Professionals usually produce images with a limited palette of colors that work well together.
 - Use images that are in focus and well-framed with the central image clearly visible rather than too far in the background or so close that important aspects are cropped out.
- **Design guidelines:**
 - An image or graphic that is crucial to the reader’s understanding and is highly detailed really deserves to stretch across the text block from margin to margin.
 - An image that is more ornamental and relatively simple can be inset within the text either on the left or right margin or centered on the page without text on either side.
 - Important images, especially those labeled as figures, must be placed as near as possible to the text they support and even referred to in the text (“See Figure 2 for an illustration of . . .”)
 - Ensure that the text and corresponding image aren’t separated by a page break if the text is close to the top or bottom of the page. The reader’s eye must be able to move between the image and corresponding text in the same field of view to seal their understanding.
- **Technical guidelines:**

- Screen resolution must be at least 72 dpi (dots per inch), the internet standard; anything less than 72 may appear pixelated even on the screen, especially if maximized in size across the page.
 - Images in documents that will be printed should be 300 dpi to avoid appearing pixelated on paper.
 - Preferred image file types include JPEG (.jpg) and PNG (.png). The latter includes the possibility of contouring so that the image doesn't necessarily have to be a square or rectangle. You can make a PNG image file of your handwritten and scanned signature, for instance, by erasing the white background around the pen strokes in Photoshop and saving the image as a PNG. That way, you can drag and drop your signature onto a signature line in an electronic document and it won't block out the line underneath if your signature typically sprawls out over lines.
- **Legal guidelines:**
 - To stay on the right side of copyright legislation, searching online for images that are free to use is easy by including licensing status in an advanced Google Image search. From the Google Images search screen:
 1. Click on the Settings spring-up menu at the bottom right.
 2. Select Advanced Search.
 3. Scroll down and click on the “usage rights” drop-down menu at the bottom.
 4. Select “free to use or share” or whatever licensing status suits your purposes.
 - Otherwise, you can acquire the right to use images for commercial purposes by purchasing them from stock photo vendors such as [Getty Images](#), [Adobe Stock](#), or [Shutterstock](#).

With modern word processors, placing an image is as easy as dragging and dropping the image file from a folder into a document (or copying and pasting). Sometimes you will need to be a little craftier with capturing images, however. For instance, if you need to capture a still image of a YouTube video to use as an image such as you see near the end of [§4.3.4](#) above, you can pause the video at the moment you would like to capture and use your computer's screen-capturing program to get the image.

- On a Windows-based computer:
 1. Open the included [Snipping Tool](#) (Microsoft Support, 2017) to turn the cursor into crosshairs.
 2. Click and drag the crosshairs to select the desired portion of the screen for capturing; when you release the cursor, the captured image will open immediately in the clipboard. Ensure that you've included only the elements necessary, rather than the whole screen, plus a short span of margin on each side.
 3. Save the image in a folder from the clipboard or add it directly to the document by switching

immediately to the document window (Alt + tab) and pasting it (Ctrl + v) wherever you've placed your cursor.

- On a Mac, use Shift + Command + 4 and use the crosshairs to select the desired portion of the screen ([Apple Support, 2017](#)).

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

4.6.7: Interactive Elements

Another aid to understanding that can benefit readers of an online or electronic document is a weblink that provides them with the option of accessing other online media. Hyperlinking is easy in modern word processors and online applications such as websites and email simply by highlighting text or clicking on an image and activating the hyperlinking feature. Press the control and k keys simultaneously (Ctrl + k), paste the web address into the URL field (copy it by clicking on the web address bar or keying Alt + d, then Ctrl + c), and hit the Okay button ([Microsoft Office Support, 2016](#)). Users prefer links that open new tabs in their browser rather than take them away entirely, so seek out that option when hyperlinking. By doing this for an image of a YouTube video screenshot, for instance, you enable readers of a document (including a PowerPoint presentation) to link directly to that video in YouTube (as you can with the YouTube image near the end of [§4.3.4](#) above) rather than embed a large video file in your document. You can additionally link to other areas within a document, as the document version of this textbook does with links to various sections like the one in the previous sentence.

4.6.8: Balancing Text and Whitespace

Another consideration that helps a reader find their way around a page is the balance of text and whitespace, which is simply a gap unoccupied by text or graphic elements. The enemy of readability is a wall of text that squeezes out any whitespace, whereas a well-designed document uses whitespace to usher the reader's eyes toward units of text. Whitespace margins frame the text in a document, for instance, as well as give readers something to hold on to so that they don't cover up any text with their thumbs. Margins should be 3 cm or 1" (2.54 cm), which are the default margin sizes in most word processors' (e.g., Microsoft Word's) blank 8.5"×11"

document. Margins also focus attention on the text itself, which makes any crowding of the margins an offense to good design. An attempt to cram more information into a one-page résumé by edging further and further into the margins, for instance, follows the law of diminishing returns: the hiring manager might take your sacrifice of the document’s readability as a sign of selfishness—that you place your own needs above that of your audience, which suggests you would do the same to the customers and management if it suited you.

4.6.9: Making Accessible, ADA-compliant Documents

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

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



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=520#oembed-1>

Key Takeaway



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

Exercises



1. Collect a variety of professional documents, such as reports, memos, and letters. If you have perfect vision, impair your vision, perhaps by dimming the lights at night or using a friend's or family member's prescription glasses. What do you notice about the readability of those documents when you've limited your eyesight? What organizational elements do you especially appreciate when trying to make sense of the document when you've otherwise hindered your ability to read?
2. Take any multi-page assignment you've done in MS Word that also includes non-text elements like photos. Run an accessibility check on it using the procedure described in [§4.6.9](#) above and fix the issues identified.
3. Produce a dummy document that follows guidelines in each of the [§4.6](#) subsections above. The content doesn't matter as much as the inclusion of features. Ensure that it has:
 - i. A proper title
 - ii. Some headings and subheadings
 - iii. A well-chosen font
 - iv. Single-spacing (1.0 with the "Don't add space" checkbox checked)
 - v. A numbered and a bulleted list
 - vi. A properly labeled image
 - vii. A hyperlink
 - viii. Nicely balanced text
 - ix. An accessibility check that you act upon by following the recommended fixes for ADA-compliant whitespace and text

References

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[Return to Chapter 4 menu](#)

CHAPTER 5: THE WRITING PROCESS—EDITING

Sydney Epps

Chapter Learning Objectives

1. Revise and edit documents and messages that are organized, complete, and tailored to specific audiences.

Whatever you do, don't quit now! Self-correction is an essential part of the writing process, one that students or professionals skip at their peril. Say you flew through drafting a quick email. Glancing back to ensure that it's correct in terms of its grammar, punctuation, spelling, and mechanics helps you avoid confusing your reader or embarrassing yourself. Communication errors within emails are like stains on your shirt or rips in your uniform: they give the impression that you are incompetent or apathetic about your messaging; professors and employers believe this shows a lack of attention to detail. In fact, they may even believe that poor messaging is a malware or phishing attack (Parsons et al., 2016).

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

The final stage of the writing process involves managing your readers' impressions by editing your draft from beginning to end. Initially, this involves returning to your goals at the start of the writing process and assessing where your document is in relation to the strategy set to achieve it. When you get a sense of how far your document is from achieving that primary purpose, you realize what needs to be done to close that gap—what you need to add, rewrite, delete, and improve. Your next move is a two-step editing process of substantial

revisions and proof-editing. The order of these is crucial to avoid wasting time. You wouldn't proofread for minor grammatical errors before substantial revisions because you may end up deleting paragraphs you meticulously proofread with a fine-tooth comb. Divide the editing process in the following order:

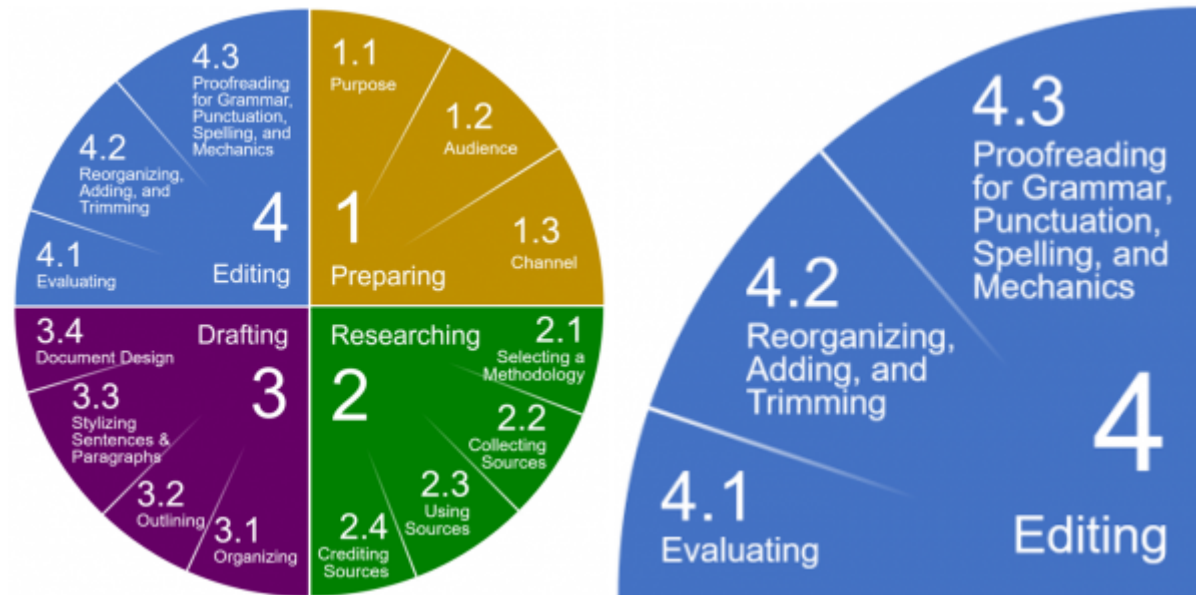


Figure 5: The four-stage writing process and stage 4 breakdown

- [5.1: Substantial Revisions](#)
- [5.2: Proofreading for Grammar](#)
- [5.3: Proofreading for Punctuation](#)
- [5.4: Proofreading for Spelling](#)
- [5.5: Proofreading for Mechanics](#)

Reference

Parsons, K., Butavicius, M., Pattinson, M., Calic, D., McCormac, A., & Jerram, C. (2016). Do users focus on the correct cues to differentiate between phishing and genuine emails?. arXiv preprint arXiv:1605.04717.

5.1: Substantial Revisions

Section 5.1 Learning Objectives



1. Revise and edit documents and messages that are organized, complete, and tailored to specific audiences.

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

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

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

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

- [5.1.1: Evaluating Your Draft](#)
- [5.1.2: Reorganizing Your Draft](#)
- [5.1.3: Adding to Your Draft](#)

- [5.1.4: Trimming Your Draft](#)

5.1.1: Evaluating Your Draft

When considering how your draft meets the objectives you set out to achieve at the outset, use a few different lenses to assess that achievement. Each lens corresponds to a step in the drafting process, as shown in the table below.

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

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

Approaching the text critically as if you were the reader you’re catering to—not as the words’ sentimental and protective parent—means keeping the most effective and clear concepts and assuring they flow together into a cohesive narrative.

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

When evaluating for organization, consider the flow of content to determine if the document leads the reader through to the intended understanding of the topic. Is it clear that you’re taking the direct approach by getting right to the point when you need to do so, or is it obvious that you’re taking the indirect approach as necessary? Would it be clear to your reader what organizing principle you’ve followed? When you outlined your draft, you did so from a preliminary understanding of your topic. As you have drafted your message, do you see that something you first thought made sense near the end of your draft makes more sense at the beginning? Shifting paragraphs around for flow is a part of the editing process that will assure related concepts are close.

When evaluating for style, again consider your audience’s needs, expectations, and abilities. Did you draft in an informal style but now realize that a slightly more formal style is more appropriate or vice versa? If you produced a 6 Cs style rubric for Exercise #1 at the end of §4.5.3, apply it now to your draft to determine if it meets audience expectations in terms of its clarity, conciseness, coherence, correctness, courtesy, and

confidence. Now would also be a great time to assess whether your style is consistent or whether you started off formal but then lapsed into informality or vice versa.

When evaluating for readability, consider your audience's needs in terms of the many features that frame and divide the text so that your reader doesn't get lost, confused, overwhelmed, repulsed, or bored. Check for whether you can do the following:

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

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

5.1.2: Reorganizing Your Draft

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

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

5.1.3: Adding to Your Draft

In furnishing your new apartment or house, especially if it's larger than what you had before, you'll find that merely transplanting your old furniture isn't enough. The new space now has gaps that need to be filled—a chair here, a couch there, perhaps a rug to tie the whole room together. Likewise, you'll find when writing a document that gaps need to be filled with more detail. Knowing your organizing principles well is helpful here.

If you're explaining a procedure in a chronological sequence of steps, for instance, you may find that one of the steps you describe involves a whole other sequence of steps that you're sure your audience won't know. In this case, embedding the additional sequence using a sub-list numbered with roman numerals (if you used Arabic numerals in the main list) completes the explanation. Of course, keep in mind any stated maximum word or page requirements in case your document exceeds the acceptable range. If it does, then you must be ruthless about chopping anything unnecessary out of your draft.

5.1.4: Trimming Your Draft



[“A worker prunes trees on THANDI Farm”](#) by [World Bank Photo Collection](#) is licensed under [CC BY-NC-ND 2.0](#).

As #2 in the 6 Cs of good writing, conciseness means using the fewest words possible to achieve the goal of communication, which is for your reader to understand your intended meaning. Many college students who stretched out their words to reach 1,000-word essays are relieved to find that college and professional audiences prefer writing that is as terse as a text. Indeed, because typing with thumbs is inefficient compared with 10 fingers on a keyboard and no one wants to read more than they must on a little screen, texting helps teach conciseness. Although professional writing requires a higher quality of writing than friends require of texts, the audience expectations are the same. The more succinct

your writing is without compromising clarity, the more your reader will appreciate your writing. Given the choice between an article of 500 words and one of 250 that says the same thing, any reader would prefer the 250-word version. We all have better things to do in our jobs than read long-winded blather. Anything that doesn't contribute to the purpose of your message or document as you conceived it back in Step 1.1 of the writing process must go.

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

1. Mass-delete Whatever Doesn't Belong

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

2. Delete Long Lead-ins

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

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

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

3. Pare Down Unnecessarily Wordy Phrases

We habitually sprinkle long stock phrases into everyday speech because they sound fancy merely because they're long and sometimes old-fashioned, as if length and long-time use grants respectability (it doesn't). These phrases look ridiculously cumbersome when seen next to their more concise equivalent words and

phrases, as you can see in Table 5.1.4.3 below. Unless you have good reason to do otherwise, always replace the former with the latter in your writing.

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

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

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

4. Delete Redundant Words

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

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

5. Delete Filler Expressions and Words

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

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

In the first and third cases, you can simply delete "There are" and "It is," as well as the relative pronouns "who" and "that," respectively, leaving the sentence perfectly fine without them. In the second case, deleting "There is" requires slightly reorganizing the word order but otherwise requires no additional words to say the very same thing. In each case, you save two or three words that simply don't need to be there.

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

technology of the future

future technology

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

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

The shareholders unanimously supported the initiative.

Shareholders unanimously supported the initiative.

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

6. Delete Needless Adverbs

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

- actually
- basically
- completely
- definitely
- extremely
- fairly
- fully
- greatly
- hugely
- literally
- quite
- rather
- really
- somewhat
- terribly
- totally
- very

- wholly

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

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

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

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

7. Favor Short, Plain Words and Use Jargon Selectively

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

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

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

Table 5.1.4.7: Favor Plain, Simple Words over Polysyllabic Words

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

Source: [Brockway \(2015\)](#)

The longer words in the above table tend to come from the Greek and Latin side of the English language’s parentage, whereas the shorter words come from the Anglo-Saxon (Germanic) side. When toddlers begin speaking English, they use Anglo-Saxon-derived words because they’re easier to master and therefore recognize them as plain, simple words throughout their adult lives.

Avoid using longer words when they are grammatically incorrect. For instance, using **reflexive pronouns** such as “myself” just because it sounds fancy instead looks foolish when the subject pronoun “I” or object pronoun “me” are correct.

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

The same goes for misusing the other reflexive pronouns “yourself” instead of “you,” “himself” or “herself” instead of “him” or “her,” etc.

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

Call me if you are confused by anything in the ~~said~~ contract. Call me if you are confused by anything in the contract.

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

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

8. Simplify Verbs

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

*The candidate cannot **be supported by** our membership.* Our members cannot **support** the candidate.

Here, the active-voice construction on the right uses two fewer words to say the same thing. Though we saw in §4.3.4 that there certainly are legitimate uses of the passive voice, overusing the passive voice sounds unnatural and appears as an attempt to extend the word count or sound more fancy and objective. Because the passive voice is either more wordy or more vague than the active voice, however, readers prefer the latter most of the time and so should you.

Another common annoyance to busy readers is using continuous verb forms instead of simple ones. The continuous verb form uses the participle form of the main verb, which means adding an -ing ending to it, and adds an auxiliary verb (form of the verb *to be*, which differs according to the person and number) to

determine the tense (past, past perfect, present, future, future perfect, etc.). In the table below, you can see how cumbersome continuous forms are compared with simple ones.

Table 5.1.4.8: Favor Simple Verb Forms Instead of Continuous Forms

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

1. Go to File (Alt + f) and, in the **File** menu, click on **Options** (at the bottom; Alt + t) to open the Word Options control panel.
2. Click on **Proofing** in the Word Options control panel.
3. Check all the boxes in the “When correcting spelling and grammar in Word” section of the Word Options control panel.
4. Click on the **Settings...** button beside “Writing Style” under the check boxes to open the Grammar Settings control panel.
5. Click on all the check boxes in the Grammar Settings control panel, as well as the Okay button of both this panel and the Word Options panel to activate.

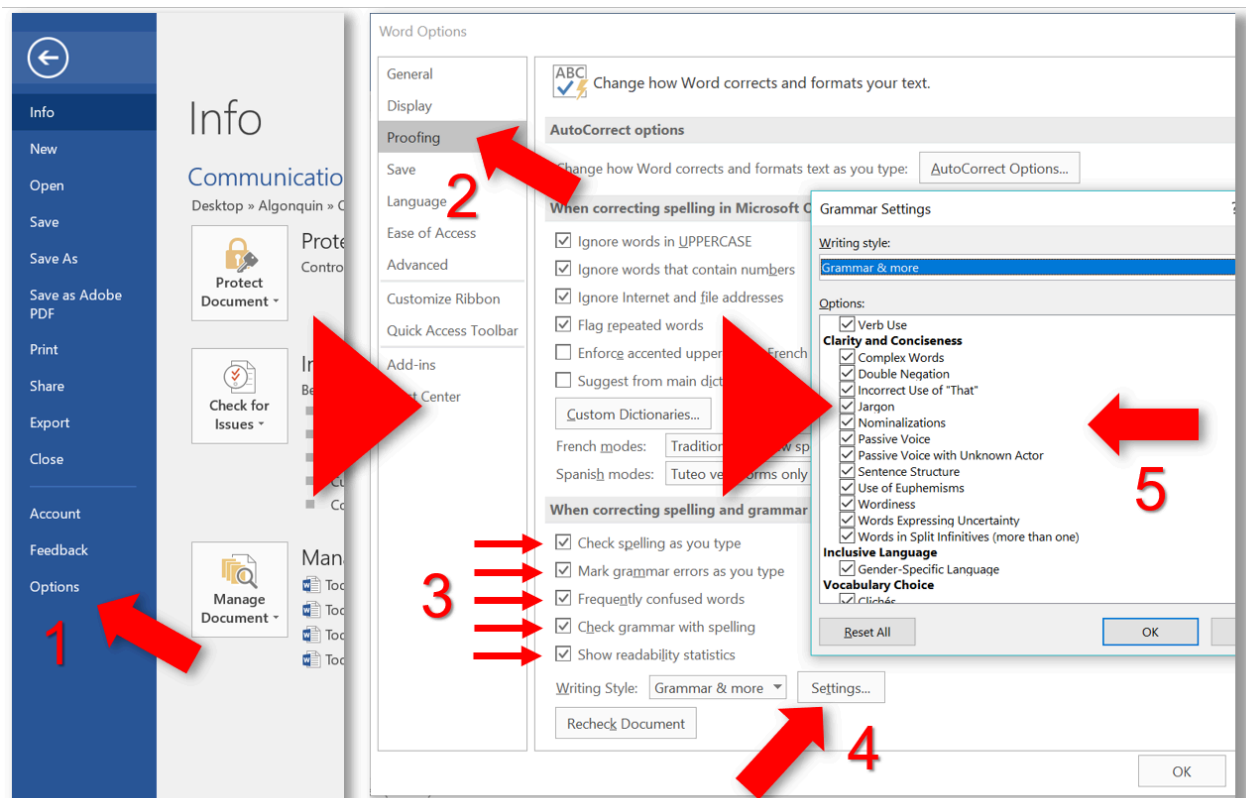


Figure 5.1.4.8: Setting up your MS Word Grammar, Style, and Spellchecker

6. Go to the **Review** menu tab in the tool ribbon at the top of the Word screen and select Spelling & Grammar (Alt + r, s) to activate the Editor that will, besides checking for spelling and grammar errors, also check for all of the stylistic errors you checked boxes for in the Grammar Settings control panel.

When you finish running your grammar, style, and spellchecker through your document, a dialog box will appear showing readability statistics. Pay close attention to stats such as the average number of words per sentence and letters per word. If the former exceeds thirty and the latter ten, your writing might pose significant challenges to some readers, especially ESL. Do them a solid favor by breaking up your sentences and simplifying your word choices.

Rather than suck the life out of language by adding useless verbiage, make your writing like a paperclip. A paperclip is beautiful in its elegance. It's so simple in its construction and yet does its job of holding paper together perfectly without any extra parts or mechanisms like staples that need to fasten pages together and unfasten them. A paperclip does it with just a couple of inches of thin, machine-bent wire. We should all aspire to make our language as elegant as a paperclip so that we can live a life free of time-wasting writing.

Key Takeaway



Begin editing any document by evaluating it for the quality of its content, organization, style, and readability, then add to, reorganize, and trim it as necessary to meet the needs of the target audience.

Exercises



1. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago so that it almost seems like it was written by another person. Evaluate and comment on its content, organization, style, and readability. Explain how you can improve it from each of these perspectives. Add to that assignment anything that would help the target audience understand it better. Trim that assignment using the eight strategies explained in §5.1.4 above.
2. What are some ways you can detail the differences between formal and informal writing? Make a list of three notable ways you can determine if an article or text has been written for an audience of scholars or a group of friends. What forms of communication tend to be less formal?

Reference

Brockway, L. H. (2015, November 3). 24 complex words—and their simpler alternative. Retrieved from <https://www.prdaily.com/24-complex-words-and-their-simpler-alternatives/>

5.2: Proofreading for Grammar

Section 5.2 Learning Objectives



1. Identify and correct sentence errors such as comma splices, run-ons, and fragments.
2. Identify and correct grammatical errors such as subject-verb and pronoun-antecedent disagreement, as well as faulty parallelism.
3. Identify and correct syntax errors such as misplaced modifiers.
4. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

Grammar organizes the relationships between words in a sentence, especially between the doer and action, so that the reader can understand in detail who's doing what. When you botch those connections with grammar errors, however, you risk confusing the reader. Severe errors force the reader to interpret what you meant. If the reader then acts on an interpretation different from the meaning you intended, major consequences can ensue, including expensive damage control. You can avoid being a liability and embarrassing yourself by following some simple rules for how to structure your sentences grammatically. By following these rules habitually, especially when you apply them at the proofreading stage, not only will your writing be clearer to the reader and better organized, but your thought process may become more organized as well.

- [5.2.1: Sentence Errors](#)
- [5.2.2: Grammar Errors](#)

5.2.1: Sentence Errors

Readers who find comma splices, fragments, and run-on sentences lose confidence in the writer's command of language and thus the quality of their work. Such giveaways suggest that the writer doesn't know much about sentence structure and punctuation. This is especially bad coming from native English speakers in their 20s or older because it says that they still don't understand the basics of their own written language even after decades of using it. It's important to know what to look for, then, when proofreading your draft for sentence errors.

- [5.2.1.1: Comma Splices](#)
- [5.2.1.2: Run-on Sentences](#)

- [5.2.1.3: Sentence Fragments](#)

1. Comma Splices

A comma splice is simply two independent clauses separated by only a comma. Perhaps the error comes from writers thinking that, because the two clauses say closely related things, they need something a little “lighter” than a period to separate them. While separating them with a comma is certainly possible, doing so with a comma alone shows that the writer doesn’t fully understand what a sentence is and what commas do.

The sale begins on Saturday, let’s get there right at 9am.

comma splice

Figure 5.2.11: A comma splice is a comma separating two independent clauses

Spotting a comma splice requires being able to identify an independent clause—that is, the combination of a subject and predicate (noun + verb) that can stand on its own as a sentence. In the Figure 5.2.1.1 example above, the first independent clause’s subject is “The sale” and its predicate is “begins on Saturday” (sale + begins), so it can stand on its own as a sentence if it ended with a period. The second is an imperative clause with the main verb being “let,” so it too can stand on its own as a sentence. When proofreading, be on the lookout for commas that have independent clauses on either side—that is, clauses that can stand on their own as sentences.

Fixing a comma splice is as easy as swapping out the comma for the correct punctuation or adding a conjunction, depending on the relationship you want to express between the two clauses. Altogether, you have four options in correcting a comma splice—two that replace the comma with other punctuation and two that leave it as-is but add a conjunction:

- Replace the comma with a **period** to turn the two independent clauses into two sentences if each is a distinct enough complete thought. Don’t forget to capitalize the letter that followed the comma.

Correcting the comma splice in the Figure 5.2.1.1 example would look as follows:

The sale begins on Saturday. Let’s get there at 9 a.m.

- Replace the comma with a **semicolon** to form a compound sentence if the two independent clauses are related enough to be in the same sentence:

The sale begins on Saturday; let’s get there at 9 a.m.

If the writer wanted something a little lighter than a period to separate the two clauses, then a semicolon fits the bill.

- Add a **coordinating conjunction** (e.g., and, but, so; see Table 4.3.2a for all seven of them) to form a compound sentence if it clarifies the relationship between the independent clauses:

*The sale begins on Saturday, **so** let's get there at 9 a.m.*

Note that if you see three or more independent clauses with commas between them and an *and* or *or* before the last one, then it's a perfectly correct (albeit probably too long) compound sentence that combines whole clauses rather than just nouns or verbs. See the final example given in Comma Rule 4 below for a sentence organized into a list of clauses.

- Add a **subordinating conjunction** (e.g., when, if, though, etc.; see Table 4.3.2a for more) to form a complex sentence (see Table 4.3.2b for more on complex sentences):

***When** the sale begins on Saturday, let's get there at 9 a.m.*

Though each of the above comma-splice fixes is grammatically correct, the last two are best because adding a conjunction clarifies the relationship between the ideas expressed in the two clauses.

A common comma-splice error involves “however” following a comma that separates two independent clauses. Consider the following sentences that are grammatically equivalent:

*The company raised its rates, **however**, we were granted an exemption.*

= *The company raised its rates, **however** we were granted an exemption.*

= *The company raised its rates, we were granted an exemption.*

Seeing that you have independent clauses on either side of the comma preceding “however” is easier if you imagine the sentence without both “however” and the comma following it, as in the third example sentence above. Fixing the error is as easy as replacing the comma preceding “however” with a semicolon and ensuring that a comma follows “however,” which is a conjunctive adverb (see Comma Rule 2 below):

*The company raised its rates; **however**, we were granted an exemption.*

This is somewhat tricky because “however” can be surrounded by commas if it's used as an interjection between the subject and predicate (see Comma Rule 3 below) or between clauses in a complex sentence:

*This particular company, **however**, had been delaying raising its rates for years.*

*With the company raising its rates, **however**, we had to apply for an exemption.*

Because you see the first clause beginning with “With” in the second example, you know that it's a dependent clause that will end with a comma followed by the main clause. It's thus possible to add “however” where the comma separates the subordinate from the main clause.

When proofreading, be on the lookout for “however” surrounded by commas. If the clauses on either side can stand on their own as sentences, fix the comma splice easily by replacing the first comma with a semicolon. If one of the clauses before or after is a subordinate clause and the other a main clause, however, then you're safe (as in this sentence). For more on comma splices, see the following resources:

- [Run-on Sentences and Comma Splices](#) (Purdue OWL)
- [Fixing Comma Splices](#) (Plotnick, 2003)

2. Run-on Sentences

Whereas a comma splice places the wrong punctuation between independent clauses, a run-on (a.k.a. fused) sentence simply omits punctuation between them. Perhaps this comes from the second clause following the first so closely in the writer’s free-flowing stream of consciousness that they don’t think any punctuation is necessary between them. While it may be clear to the writer where one idea-clause ends and the other begins, that division isn’t so clear to the reader. The absence of punctuation will cause them to trip up, and they’re forced to mentally insert the proper punctuation to make sense of it, which is frustrating.

Spotting a run-on is easy if it’s just commas missing before coordinating conjunctions. If you string together the last couple of sentences concluding the above paragraph, for instance, and use conjunctions to separate the four clauses without accompanying commas, you’ll get a cumbersome run-on:

*That division isn’t so clear to the reader **and** the absence of punctuation will cause them to trip up **and** they’re forced to mentally insert the proper punctuation to make sense of it **and** that’s frustrating.*

“Run-on” is a good description for sentences like this because they seem like they can just go on forever like a toddler tacking on clause after clause using coordinating conjunctions (... and ... and ... and ...). Though the above sentence would be perfectly correct if commas preceded “and” and “so,” adding further clauses would just exhaust the reader’s patience, commas or no commas. A run-on is not necessarily the same as a long sentence. Such a long sentence can become convoluted, however, especially for audiences who may struggle with English, such as ESL learners.

Sometimes spotting a run-on is just a matter of tripping over its nonsense. Say you’re reading your draft and then come across the following sentence:

We’ll have to drive the station is too far away to get there on foot.

You’re doing just fine reading this sentence up until the word “is,” since, the way things were going, you probably expected a vehicle to follow the article “the.” Assuming “drive” is being used as a [transitive verb](#) (Simmons, 2007) that takes an object, “station wagon” would make sense. When you see “is” instead of “wagon,” however, you might go back and see if the writer forgot to put “to” before “station” to make “drive to the station.” That doesn’t make sense either, however, given what follows. Finally, you realize that you’re really dealing with two distinct independent clauses starting with a short one and that some punctuation is missing after “drive.” The sentence is like a chain with a broken link.

Once you’ve found that missing link, fixing a run-on is just a simple matter of adding the correct punctuation and perhaps a conjunction, depending on the relationship between the clauses. Indeed, the options for fixing a run-on are identical to those for fixing a comma splice. Following the same menu of options as those presented above, you would be correct doing any of the following:

- Add a **period** between the clauses (after “drive”) and capitalize “the” to form two sentences:

We'll have to drive. The station is too far away to get there on foot.

- Add a **semicolon** between the clauses to form a compound sentence:

We'll have to drive; the station is too far away to get there on foot.

This is the easiest, quickest fix of them all.

- Add a comma and **coordinating conjunction** to form a compound sentence:

We'll have to drive, for the station is too far away to get there on foot.

- Add a **subordinating conjunction** to form a complex sentence:

We'll have to drive because the station is too far away to get there on foot.

Again, though each of the above run-on fixes is grammatically correct, only the last one best clarifies the relationship between the ideas expressed in the two clauses. For more on run-on sentences, see the following resources:

- [Run-on Sentences and Comma Splices](#) (Purdue OWL, n.d.)
- [Grammar: Run-on Sentences and Sentence Fragments](#) (Walden University, 2016)

3. Sentence Fragments

A sentence fragment is one that's incomplete usually because either the main-clause subject, predicate, or both are missing. The most common sentence fragment is the latter, where a subordinate clause poses as a sentence on its own, usually with its main clause being the preceding or following sentence. If the final example in §5.2.1.2 above were a fragment, it would look like the following:

*We'll have to drive. **Because** the station is too far away to get there on foot.*

Recall that a complex sentence combines a main (a.k.a. independent) clause with a subordinate (a.k.a. dependent) clause, and the cue for the latter is that it begins with a subordinating conjunction (see Table 4.3.2a for several examples). In the above case, the coordinating conjunction “because” makes the clause subordinate, which must join with a main clause in the same sentence to be complete.

The fix is simply to join the fragment subordinate clause with its main clause nearby so that they're in the same sentence. You can do this in one of two ways, either of which is perfectly correct:

- Delete the period between the sentences and make the subordinating conjunction lowercase if the

subordinate clause follows the main clause:

*We'll have to drive **b**ecause the station is too far away to get there on foot.*

- Move the subordinate clause so that it precedes the main clause, separate the two with a comma, and make the first letter of the main clause lowercase:

***B**ecause the station is too far away to get there on foot, **w**e'll have to drive.*

The same applies to sentences that begin with any of the seven coordinating conjunctions. These are technically fragments but can be easily fixed by joining them with the previous sentence to make a compound. You could also change the conjunction to something else, such as a conjunctive adverb like “However” for “but” or “Also” for “and” followed by a comma:

*The station is too far away to get there on foot. **B**ut we'll drive.*

*The station is too far away to get there on foot, **b**ut we'll drive.*

*The station is too far away to get there on foot. **H**owever, we'll drive.*

You may also encounter fragments that are just noun phrases, verb phrases, prepositional phrases, and so on. Of course, we speak often in fragments rather than full sentences, so if we're writing informally, such fragments are perfectly acceptable. Even in some formal documents, such as résumés, fragments are expected in certain locations such as the Objective statement (an infinitive phrase) and profile paragraph (noun phrases) and in the Qualifications Summary.

If we're writing formally, however, these fragmentary phrases are variations on the error of leaving sentences incomplete. The easy fix is always to re-unite them with a proper sentence or to make them into one by adding parts.

*We thank you for choosing our company. **A**s well as the impressive initiative you've taken.*

*We thank you for choosing our company **a**nd are impressed by the initiative you've taken.*

*We thank you for choosing our company. **Y**ou've shown impressive initiative.*

The beauty of the English language is that there's an endless number of ways to say something and still be grammatically correct as long as you know what makes a proper sentence. If you don't, review §4.3.1 and §4.3.2 till you can spot the main subject noun and verb in any sentence, as well as tell if they're missing. For more on fragments, see the following resources:

- [Sentence Fragments](#) (Purdue OWL, n.d.)
- [Grammar: Run-on Sentences and Sentence Fragments](#) (Walden University, 2016)

For exercises in spotting and fixing comma splices, run-ons, and fragments, see the digital activities at the

bottom of the Guide to Grammar and Writing pages linked above (Purdue OWL, n.d.), as well as [Exercise: Run-ons, Comma Splices, and Fused Sentences](#) (Purdue OWL, n.d.).

5.2.2: Grammar Errors

Let's focus on some of the most common grammar errors in college and professional writing:

- [5.2.2.1: Subject-verb Disagreement](#)
- [5.2.2.2: Pronoun-antecedent Disagreement](#)
- [5.2.2.3: Faulty Parallelism](#)
- [5.2.2.4: Dangling and Misplaced Modifiers](#)

1. Subject-verb Disagreement

Perhaps the most common grammatical error is subject-verb disagreement, which is when you pair a singular subject noun with a plural verb (usually ending without an s) instead of a singular one (usually ending with an s) or vice versa. Spotting such **disagreements of number** requires being able to identify the subject noun and main verb of every sentence and hence knowledge of sentence structure. The search for the main subject noun and verb is complicated by the fact that many other nouns and verbs in various phrase types can crowd into a sentence. The following subject-verb agreement (abbreviated “Subj-v Agr.”) rules help you know what to look for.

Quick Rules

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common subject-verb disagreement errors associated with each one.

Subj-v Agr Rule 1.1:

Singular subjects take singular verbs.

*The **first** of many cuts **is** going to be the deepest.*

Subj-v Agr Rule 1.2:

The indefinite pronouns *each*, *either*, and *neither*, and those ending with *-body* or *-one* take a singular verb.

*If **each** of you **chooses** wisely, **someone is** going to win the prize, but **everybody wins** because **neither** really **loses**.*

Subj-v Agr Rule 1.3:

Collective nouns and some irregular nouns with plural endings are singular and take a singular verb.

*The **band** **isn't** going on stage until the **news** about the stage lighting **is** more positive.*

Subj-v Agr Rule 2:

Plural noun, compound noun, and plural indefinite pronoun subjects take plural verbs.

*The **rights** of the majority usually **trump** those of minority groups, except when money **and** politics **conspire**, and **both** usually **do**.*

Subj-v Agr Rule 3:

Compound subjects joined by *or* or *nor* take verbs that agree in number with the nouns closest to them.

*Neither your **lawyers** **nor** the justice **system** **is** going to be able to adequately punish this type of crime.*

Subj-v Agr Rule 4:

The verb in clauses beginning with *there* or *here* agrees with the subject noun following the verb.

***There are** two **types** of people in the world, and **here comes** one of them now.*

Extended Explanations

Subj-v Agr. Rule 1.1: Singular subjects take singular verbs.

When the subject of the sentence—the doer of the action—is a singular subject (i.e., one doer), the verb (the action it performs) is always singular. Watch out, though: this rule holds even if phrases modifying the subject or intervening parenthetical elements are plural. You just have to be able to tell that those phrases and parenthetical elements aren't the main subject and therefore don't count when determining the number of the verb.

Correct:

*Our **investment** **is** paying off nicely.*

Why it's correct: The singular subject “investment” takes the singular verb “is,” which is the third-person singular form of the verb *to be*.

Correct:

*The **source** of all our network errors **disappears** whenever you do a system restart.*

Why it's correct: The singular subject “source” takes the singular main verb “disappears”; the plural

noun “errors” immediately before the verb is just the last word in a prepositional phrase (“of . . .”) modifying the subject.

Correct:

*Stalling for time to think of better responses **doesn't** work in a job interview.*

Why it's correct: The singular subject “stalling,” a gerund (action noun), takes the singular main verb “does”; the plural noun “responses” immediately before the verb is just the last word in a prepositional phrase (“of . . .”) embedded in an infinitive phrase (“to think . . .”) embedded in another prepositional phrase (“for . . .”).

Correct:

*The **singer-songwriter**, along with new additions to her five-piece backup band, **arrives** at the press conference at 1:30 p.m.*

Why it's correct: Despite the parenthetical addition of other actors, the grammatical subject (“singer-songwriter”) is still singular and takes a singular verb.

How This Helps the Reader

Following this rule helps the reader connect the doer of the action with the main action itself, especially when a variety of phrases, including nouns of different number, intervene between the subject noun and main verb.

What to Look for When Proofreading

Look for subject nouns (the main doers of the action) and the main verbs that the subject noun takes, then ensure that both are singular. Look out especially for verbs that are wrongly plural in form because the nouns immediately preceding them are plural despite the fact that they are only part of phrases modifying the main subject noun.

Incorrect:

*The best **vodka** in the opinion of all the experts at international competitions **are** surprisingly the bottom-shelf Alberta Pure.*

The fix:

*The best **vodka** in the opinion of all the experts at international competitions **is** surprisingly the bottom-shelf Alberta Pure.*

Incorrect:

*The lucky **winner**, as well as three of their best friends, **are** going on an all-expenses-paid trip to beautiful Cornwall, Ontario!*

The fix:

*The lucky **winner**, as well as three of their best friends, **is** going on an all-expenses-paid trip to beautiful Cornwall, Ontario!*

In the first incorrect example sentence above, the proximity of the plural nouns “experts” and

“competitions” to the main verb (form of *to be*) probably made the writer think that the verb had to be plural, too. The true subject noun of the sentence, however, is “vodka,” which is singular and therefore takes the singular verb “is” no matter what comes between them. In the second incorrect sentence, the grammatical subject is the singular “winner,” so the main verb should be the singular “is,” not the plural “are.” A parenthetical interjection between the subject and the verb, even if it appears to pluralize the subject with “as well as,” “along with,” “plus,” or the like, technically doesn’t make a compound subject (see Subj-v Agr. Rule 2 below for more on compounds).

Subj-v Agr. Rule 1.2: The indefinite pronouns *each*, *either*, *neither*, and those ending with *-body* or *-one* take a singular verb.

When the subject noun of the sentence is the indefinite pronoun *either*, *neither*, *each*, *anybody*, *everybody*, *nobody*, *somebody*, *anyone*, *everyone*, *someone*, *no one*, or *none* (see Table 4.4.2a above on pronouns), it is singular and takes a singular verb.

Correct:

Each has enough personal finance know-how to handle her own taxes.

Why it’s correct: The subject pronoun “Each” can be thought of as the singular “Each one” and therefore takes a singular verb. In this case the verb is “has” rather than the plural “have” that would be appropriate if the subject were “All of them.”

Correct:

Either is fine.

Why it’s correct: The subject pronoun “Either” can be thought of as the singular “Either one,” despite implying a pair of options, and therefore takes a singular verb—in this case “is.”

Correct:

“Perhaps none is more vulnerable than James, a soft-spoken 19-year-old who is quick to flash a smile that would melt ice” (Chianello, 2014, ¶24).

Why it’s correct: The subject pronoun “none” in this case can be thought of as the singular “no one” because the topic of the sentence concerns a single person. The pronoun therefore takes a singular verb—in this case “is” rather than the plural “are.”

Exception: *None* can sometimes be a plural indefinite pronoun depending on what comes later in the sentence.

Correct:

“None are more hopelessly enslaved than those who falsely believe they are free” (Goethe, 1809, p. 397).

Why it’s correct: The subject pronoun “none” can be thought of as “no people,” consistent in number with the later pronoun “those,” and thus a plural pronoun that takes a plural verb—in this case “are,” not “is.”

How This Helps the Reader

Following this rule helps the reader see that the “one” or “body” suffix in each of these indefinite pronouns is singular, even if the word applies to many people, and therefore takes a singular verb form.

What to Look for When Proofreading

Look for any indefinite pronouns ending with *-one* or *-body* taking a plural main verb and change the verb to the singular form.

Incorrect:

*Everybody here **share** our opinion on quantitative easing.*

The fix: *Everybody here **shares** our opinion on quantitative easing.*

The fix: *All here **share** our opinion on quantitative easing.*

Incorrect:

*Each of you **send** enough carbon into the atmosphere to poison a river.*

The fix: *Each of you **sends** enough carbon into the atmosphere to poison a river.*

The fix: *All of you **send** enough carbon into the atmosphere to poison a river.*

Here, the “every” part of the word *everybody* in the first incorrect sentence and the fact that the second addresses a group suggests to the confused writer that a plurality of actors is at play, thus requiring the plural verbs “share” and “send.” Wrong! The “body” part of the word is the operative one; being singular, it takes a singular verb—“shares” in this case—and “Each” is short for “Each one.” Another fix in each case is to make the subject the plural “All” and keep the verbs plural.

Subj-v Agr. Rule 1.3: Collective nouns and some irregular nouns with plural endings are singular and take a singular verb.

Collective nouns such as “group” are grammatically singular and thus take a singular verb despite meaning several people or things. The following are common collective nouns:

army	department	party
audience	faculty	plethora
band	family	public
board	firm	office
bundle	gang	school
cabinet	group	senate
class	jury	society
committee	majority	task force
company	membership	team
corporation	minority	tribe
council	navy	troupe
crew	pack	

The same is true of any company name that ends in *s* or has a compound name (e.g., Food Basics, Long &

McQuade), as well as any compound of inanimate objects treated as a singular entity (e.g., meat and potatoes is considered one dish; see Subj-v Agr. Rule 2 below for more on compounds). Likewise, some special-case words that look like plurals because they end with *s* instead take singular pronouns and verbs, especially names for games and disciplines or areas of study, as well as dollar amounts, distances, and amounts of time:

acoustics	dominoes	mathematics
billiards	economics	measles
cards	ethics	mumps
civics	gymnastics	news
crossroads	# hours	physics
darts	# meters	rabies
# dollars	linguistics	shambles

Note that most of these words will be plural if used other than meaning disciplines, fields of study, games, or number of units. For instance, when you're playing darts, you would use the plural verb in "Three darts **remain**" to refer to three individual darts in your hand but use a singular verb when saying "Darts **is** a way of life" because you're now using "darts" in the sense of the game rather than the object.

Correct:

*The **committee demands** action on the latest media blunder.*

Why it's correct: The collective noun "committee" is singular, despite being comprised of several people, and therefore takes the singular verb "demands," not the plural "demand."

Correct:

*A demolition **crew** of three sledgehammer-wielding heavies is leveling the house as we speak.*

Why it's correct: The collective noun "crew" is singular despite being followed by a prepositional phrase detailing how many people are in the crew. Despite also the plural noun "heavies" preceding the main verb, the singular "is" is the correct verb rather than the plural "are."

Correct:

***Food Basics has** a deal on for ice cream right now, and **Dolce & Gabbana has** some fresh new styles coming this season.*

Why it's correct: Though the subject nouns seem plural because one ends with *s* and the other compounds two names, being a single corporate entity in each case makes them singular and take the singular verb "has" rather than the plural "have."

Correct:

*Oh look, **green eggs and ham is** on the menu.*

Why it's correct: Though the subject noun seems plural because it is a compound of a plural and singular noun, it is considered one singular dish and therefore takes the singular verb "is" rather than the plural "are."

Correct:

*The **news is** so depressing today.*

Why it's correct: Though the subject noun seems plural because it ends with *s*, “news” is a singular noun taking the singular verb “is,” not the plural “are.”

Correct:

Ethics isn't an optional field of study for business professionals.

Why it's correct: Though the subject noun seems plural because it ends with *s* and the singular “ethic” is also a legitimate word, it acts in this case as a singular entity because it is a field of study and therefore takes the singular verb “is.”

Correct:

Five dollars donated to the right charities is all that's needed to save a life.

Why it's correct: Though the subject noun seems plural because it contains more than one dollar, it acts as a singular entity and thus takes the singular verb “is” regardless of the noun “charities” that comes before it in a prepositional phrase.

Correct:

Ten kilometers is too far to walk because those ten kilometers are going to make us late.

Why it's correct: The first “Ten kilometers” is a grammatically singular subject because the distance as a whole is meant. The second instance refers to each individual kilometer together with the others, however, so it is grammatically plural, taking the plural pronoun “those” and verb “are.”

How This Helps the Reader

Following this rule helps the reader connect the singular grammatical subject performing a single action in concert as one entity with the main verb, especially when phrases of different number come between them.

What to Look for When Proofreading

Look for count nouns, as well as special-case nouns that look plural but are actually singular, such as games and areas of study, like those identified above. Ensure that the main verb following them is singular rather than plural.

Incorrect:

A pack of lies averaging around twenty per day are winning over a confused and angry swath of the electorate.

The fix: *A pack of lies averaging around twenty per day is winning over a confused and angry swath of the electorate.*

Incorrect:

The acoustics in here are so bad that it makes me want to study acoustics, which are all about how sounds behave in certain environments.

The fix: *The acoustics in here are so bad that it makes me want to study acoustics, which is all about how sounds behave in certain environments.*

In the first incorrect sentence above, the collective noun “pack” is grammatically singular and must therefore take the singular verb “is,” not the plural verb “are,” despite it being comprised of a plurality of things (“lies”) identified in the prepositional phrase following it. In the second incorrect sentence, we see two different types of the word “acoustics.” One type means “sound quality,” acts as a plural grammatical subject, and therefore takes the plural verb “are.” The other, meaning the study of how sounds interact with the environment, takes the singular verb “is,” not the plural verb “are.”

Subj-v Agr. Rule 2: Plural noun, compound noun, and plural indefinite pronoun subjects take plural verbs.

When the subject of the sentence is plural or contains two or more nouns or pronouns joined by *and* to make a compound subject, the verb describing the action they perform together is always plural regardless of whether the nouns are singular or plural. The verb is plural even if the compounded subject noun closest to the verb is singular. Other word types that take plural pronouns and verbs include:

- The indefinite pronouns *both, few, many, several, and others*
- Some items that seem singular because they are assembled into one unit, such as *binoculars, glasses, jeans, pants, scissors, shears, and shorts*
- Sport teams with singular names, such as the Colorado Avalanche and Tampa Bay Lightning
- Bands of musicians with singular-sounding names such as the Tragically Hip and Arcade Fire

Correct:

*Self-driving **cars are** going to revolutionize more than just the auto industry.*

Why it’s correct: The plural subject noun “cars” takes the plural main verb “are.”

Correct:

*Goodness, **we have** our work cut out for us.*

Why it’s correct: The plural subject pronoun “we” takes the plural main verb “have”

Correct:

*All the network **systems** and the **mainframe** we’ve been updating **are** going to have to be liquidated now.*

Why it’s correct: The compound subject with the plural noun “systems” and singular noun “mainframe” takes the plural main verb “are.” All the other verbs are part of embedded phrases that don’t affect the verb number.

Correct:

*A **few** of them **say** they can’t go, but **several are** still going.*

Why it’s correct: The plural indefinite pronouns “few” and “several” take the plural verbs “say” and “are,” respectively.

Correct:

*These **pants don’t** fit, these **scissors don’t** cut, and these **shears are** kaput.*

Why it's correct: Though each of these subject nouns sells as one item, they are considered pairs grammatically and therefore take plural verbs such as “don't” instead of the singular “doesn't.”

Correct:

*The **Tragically Hip** are playing their final concert in Kingston, where they played their first show 32 years earlier.*

Why it's correct: As a five-piece band of musicians, the Tragically Hip are a grammatically plural noun despite having a singular-sounding name and therefore take the plural verb “are.”

How This Helps the Reader

Following this rule helps the reader connect the doer of the action with the main action itself, especially when a variety of phrases, including nouns of different numbers, intervene between the subject noun and main verb.

What to Look for When Proofreading

Look for subject nouns (the main doers of the action) and the main verbs that the subject noun takes, then ensure that both are plural. Look out especially for compound subjects with a singular noun close to the verb tricking you into making the main verb singular.

Incorrect:

*Most major **auto manufacturers** and, of course, **Tesla** **is** leading the way toward self-driving cars via a switch to all-electric drivetrains.*

The fix: *Most major **auto manufacturers** and, of course, **Tesla** **are** leading the way toward self-driving cars via a switch to all-electric drivetrains.*

Incorrect:

*I can respect their musicianship, but **Rush** just **annoys** me, or maybe it's just Geddy Lee's voice.*

The fix: *I can respect their musicianship, but **Rush** just **annoy** me, or maybe it's just Geddy Lee's voice.*

In the first incorrect example above, the proximity of the singular noun “Tesla” to the main verb probably made the confused writer think that the verb had to be the singular “is,” too. The subject is in fact a compound, however: “manufacturers and . . . Tesla.” Changing the main verb to a plural form easily fixes the subject-verb disagreement of number.

In the second incorrect example, the band Rush seems like it should be a singular noun and take the singular verb “annoys” because the word *rush* is singular; as a trio of musicians, however, the band is grammatically plural and takes the plural verb “annoy.” Notice, when we use the noun “band” in front of “Rush” so that “band” is grammatically the subject noun, however, we use a singular verb following Subj-v Agr. Rule 1.3 above.

Subj-v Agr. Rule 3: Compound subjects joined by *or* or *nor* take verbs that agree in number with the nouns closest to them.

When the subject of the sentence is a compound joined by the coordinating conjunction *or* or *nor*, the number (singular or plural) of the verb is determined by the subject noun that comes immediately before it.

Correct:

*Either the **players** or the **coach** **is** going to take the fall for the loss.*

Why it's correct: Though this is a compound subject comprised of the plural “players” and singular “coach,” the main verb is the singular “is” because “or” joins the two subject nouns and the one closest to the verb, “coach,” is singular.

Correct:

*When neither the project **lead** nor **dozens** of engineers **dare** to doubt the safety of the launch, you have all the makings of a Challenger-like disaster.*

Why it's correct: The plural subject pronoun “dozens,” as the second part of the compound subject including the singular “lead,” takes the plural main verb “dare” because it is closer.

How This Helps the Reader

Following this rule helps the reader see the two compounded subject nouns as separate actors performing the verb action independently of one another rather than together.

What to Look for When Proofreading

Look for plural verbs that disagree in number with singular subject nouns closest to them when the subject nouns are joined by *or* or *nor*.

Incorrect:

*A rock **or** a hard **place** **are** your only choice in this situation.*

The fix: *A rock **or** a hard **place** **is** your only choice in this situation.*

In the incorrect example above, the compounding of the two singular nouns likely made the confused writer think that the verb should be plural as it is when *and* compounds subject nouns. When *or* or *nor* compounds subjects, however, the verb must agree with whatever subject noun comes immediately before it.

Subj-v Agr. Rule 4: The verb in clauses beginning with *there* or *here* agrees with the subject noun following the verb.

When a sentence or clause begins with the pronoun *there* or *here*, the subject noun follows the verb and therefore determines whether the verb should be singular or plural. In other words, what comes before the verb usually determines whether the verb is singular or plural, but in this case, what comes after the verb does that. In such expletive constructions, as they're called, *here* or *there* are not actually subjects.

Correct:

*There appears to be a mighty **storm** approaching on the horizon.*

Why it's correct: The singular subject noun “storm” following the verb takes the singular verb “appears.”

Correct:

*Here is a **pencil** and here are some **forms** you need to fill out.*

Why it's correct: The singular subject noun “pencil” following the main verb takes the singular verb “is” in the first clause. The plural subject noun “forms” in the second clause takes the plural verb “are.”

Correct:

*There happen to be six **conditions** on which the growth of our business depends.*

Why it's correct: The plural subject noun “conditions” following the verb takes the plural verb “happen” rather than the singular “happens.”

Correct:

*There is **nothing** to the allegations of wrongdoing.*

Why it's correct: The singular subject noun “nothing” following the verb takes the singular verb “is” regardless of the plural noun “allegations” in the prepositional phrase modifying the subject noun.

Correct:

*There are too many **applications** to sort through in the given timeframe.*

Why it's correct: The plural subject noun “applications” following the verb takes the plural verb “are.”

How This Helps the Reader

In sentences beginning with the pronoun *there*, following this rule cues the reader toward the number of the subject noun before it appears.

What to Look for When Proofreading

Look for sentences or clauses beginning with *there* and ensure that the verb agrees with the noun that follows it. The verb isn't necessarily singular just because *there* comes before the verb (where the subject is usually located) and seems like a singular pronoun.

Incorrect:

*I can't believe **there** just **happens** to be two **tickets** to the show you wanted to see in my pocket here.*

The fix: *I can't believe **there** just **happen** to be two **tickets** to the show you wanted to see in my pocket here.*

Incorrect:

*Here **is** a **bar graph** and **pie chart** you can extrapolate results from.*

The fix: *Here **are** a **bar graph** and **pie chart** you can extrapolate results from.*

In the first incorrect sentence above, the pronoun “there” is not the subject noun of the relative clause

following “that”; the plural noun “tickets” is the subject and therefore takes the plural verb “happen” rather than the singular “happens.” In the second incorrect sentence, the grammatical subject is the compound noun “bar graph and pie chart” following “Here,” so the main verb must be the plural “are,” not the singular “is.”

For more on subject-verb agreement and how to correct disagreement, see the following resources:

- [Making Subjects and Verbs Agree](#) (Paiz, Berry, & Brizee, 2018)
- [Self Teaching Unit: Subject-Verb Agreement](#) (Benner, 2000), including exercises

2. Pronoun Errors

For more on pronoun-antecedent disagreements of number (e.g., *Everybody has an opinion on this, but **they** are all wrong*), ambiguous pronouns (e.g., *The plane crashed in the field, but somehow **it** ended up unscathed—was the plane or field left unscathed?*), and pronoun case errors (e.g., *Rob and **me** are going to the bank—would you say “me is going to the bank”?*), see the following resource:

- [Common Pronoun Errors](#) (Brigham Young University-Idaho, 2019)

3. Faulty Parallelism

For more on parallelism, see the following resource:

- [Parallel Structure](#) (Purdue OWL, n.d.)

4. Dangling and Misplaced Modifiers

For more on dangling modifiers, see the following resource:

- [The Dangling Modifier](#) and [The Misplaced Modifier](#) (Simmons, 2011)

Key Takeaway



Writing sentences free of common grammar errors such as comma splices and subject-verb disagreement not only helps you avoid confusing the reader and embarrassing yourself but also helps keep your own thinking organized.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the grammar rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the sentence and grammar errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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Test Your Understanding



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://louis.pressbooks.pub/businessprofessionalcomm/?p=544#h5p-62>

5.3: Proofreading for Punctuation

Section 5.3 Learning Objectives



1. Identify and correct punctuation errors involving commas, apostrophes, colons and semicolons, parentheses and brackets, quotation marks, hyphens and dashes, question and exclamation marks, and periods.
2. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

As the little marks added between words, punctuation is like a system of traffic signs: it guides the reader toward the intended meaning of the words just as road signs guide drivers to their destination. They tell the reader when to go, when to pause, when to stop, when to go again, when to pay close attention, and when to turn ([Truss, 2003, p. 7](#)). They're also crucial for avoiding accidents. A paragraph without punctuation—no periods, commas, apostrophes, etc.—quickly spins out into utter nonsense and kills the reader's understanding of the writer's meaning.

Punctuation that's merely missing or unnecessary here and there can confuse a reader and even lead to expensive lawsuits if such errors plague contentious documents like contracts. To anyone who knows how to use them, seeing punctuation mistakes in someone else's writing makes that other person look sloppy and amateurish. Punctuation errors by adult native English speakers look especially bad because they reflect poorly on their education and attention to detail, especially if they're habitual mistakes. The critical reader looks down on anyone who hasn't figured out how to use their own language in their 20+ years of immersion in it. Not knowing the difference between a colon and semicolon, for instance, is like not knowing the difference between a cucumber and a zucchini; sure they look alike from a distance, but they're completely different species and serve different culinary functions. If you don't know these differences by the time you're an adult, however, it doesn't take much to learn.

In this section, we focus on how to spot and correct common punctuation errors, starting with commas because most problems with people's writing in general are related to missing and misused commas. The goal is to help you avoid making mistakes that can potentially embarrass you in the eyes of people who should be taking you seriously.

Complete List of Punctuation Covered in This Chapter Section

- [5.3.1: Commas](#) (,)
- [5.3.2: Apostrophes](#) (’)
- [5.3.3: Colons](#) (:)
- [5.3.4: Semicolons](#) (;)
- [5.3.5: Parentheses](#) ()
- [5.3.6: Brackets](#) []
- [5.3.7: Quotation Marks](#) (“ ”)
- [5.3.8: Hyphens](#) (-)
- [5.3.9: Long Dashes](#) (—)
- [5.3.10: Question Marks](#) (?)
- [5.3.11: Exclamation Marks](#) (!)
- [5.3.12: Periods](#) (.)

5.3.1: Commas

Most punctuation problems are comma-related because of the important role commas play in providing readers with guidance on how a sentence is organized and is to be read to understand the writer’s intended meaning. As we saw in §4.3.2, commas signal to the reader where one clause ends and another begins in compound and complex sentences, but they serve several other roles as well. We use commas in four general ways, each with several variations and special cases. To these we can add rules about where not to add commas, since many writers confuse their readers by putting commas where they shouldn’t go. Most style guides advocate for using as few commas as possible, though you certainly must use them wherever needed to avoid ambiguities that lead readers astray. Closely follow the sixteen rules below to guide your reader toward your intended meaning and avoid confusing them with comma misplacement.

Quick Rules: Commas

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common comma errors associated with each one.

-
- Comma Rule 1.1** Put a comma before coordinating conjunctions in compound sentences.
*The installers came to do their work at 8 a.m., **and** the regulators came to inspect the installation by the end of the day.*
- Comma Rule 1.2** Don't put a comma between independent clauses in a compound sentence if not followed by a coordinating conjunction.
Our main concern is patient safety; we don't want any therapeutic intervention to cause harm. (semicolon rather than a comma after "safety")
- Comma Rule 2.1** Put a comma after introductory subordinate clauses, phrases, or words preceding main clauses.
If we can't secure investor funding and launch the site by April, the clients will likely go elsewhere.
- Comma Rule 2.2** Don't put a comma after main clauses followed by subordinate clauses or phrases unless the latter strikes a contrast with the former.
*They're paying us a visit **because** they haven't seen us in a while. (no comma before "because")*
- Comma Rule 3.1** Put commas around parenthetical words, phrases, or clauses.
*See my portfolio, **which** includes my best work, on ArtStation.*
- Comma Rule 3.2** Put a comma before contrasting coordinate elements, end-of-sentence shifts, and omitted repetitions.
*He said, "go to Customer Service, **not** the checkout," **didn't** he?*
- Comma Rule 3.3** Put a comma before sentence-ending free-modifier phrases that describe elements at the beginning or middle of sentences.
*We are putting in long hours on the report, **writing frantically**.*
- Comma Rule 3.4** Put commas around higher levels of organization in dates, places, addresses, names, and numbers.
*Send your ticket to Gina Kew, **RN**, in Ottawa, **Ontario**, by Tuesday, October 9, **2018**, for your chance to win the \$5,000,000 prize.*
- Comma Rule 3.5** Put a comma between a signal phrase and a quotation.
*The reporter **replied**, "Yes, this is strictly off the record."*
- Comma Rule 3.6** Don't put commas around restrictive relative clauses (before that).
*The purchased item **that we agreed to return** is now completely lost. (no comma before "that" and after "return")*
- Comma Rule 3.7** Don't put commas between subjects and their predicates.
*The just **reward** for the difficult and dangerous job that Kyle performed for his clientele **was** the knowledge that they were safe. (no comma before "was")*
- Comma Rule 4.1** Put commas between each item in a series, including the last two items.
*You must be **kind, conscientious, and caring** in this line of work.*
- Comma Rule 4.2** Put commas between two or more coordinate adjectives.
*It was a **cool, crisp, bright** autumn morning.*
- Comma Rule 4.3** Don't put a comma after the final coordinate adjective.
*The team devised a **daring, ambitious** plan. (no comma after "ambitious")*

Comma Rule 4.4	<p>Don't put a comma between non-coordinate adjectives. <i>David played his Candy Apple Red '57 reissue Fender Stratocaster electric guitar like he was flying a Saturn V rocket to the moon.</i> (no comma between the non-coordinate adjectives throughout)</p>
Comma Rule 4.5	<p>Don't put commas between two coordinate nouns or verbs. <i>Tesla and Edison invented and patented a complete circuit of electricity distribution systems and consumption devices.</i> (no commas before any "and" here)</p>

Extended Explanations

Comma Rule 1.1: Put a comma before coordinating conjunctions in compound sentences.

Put a comma before the coordinating conjunction that joins two independent clauses in a compound sentence. A compound sentence contains two or more clauses that can stand on their own as sentences (see Table 4.3.2b for more on compound sentences) with a different subject in each clause.

Correct:

*We were having the time of our lives, **and** our lucky streak was far from over.*

Why it's correct: A comma precedes the coordinating conjunction "and" joining the independent clause beginning with the subject "We" and another beginning with the subject "our lucky streak."

Correct:

*The first round of layoffs was welcomed by all, **but** the second devastated morale.*

Why it's correct: A comma precedes the coordinating conjunction "but" joining the independent clause beginning with the subject "The first round" and another beginning with the subject "the second."

Correct:

*The management blamed external factors, **yet** none of the company's blunders would have happened under good leadership.*

Why it's correct: A comma precedes the coordinating conjunction "yet" joining the independent clause beginning with the subject "The management" and another beginning with the subject "none."

Correct:

*You can take advantage of this golden opportunity, **or** a thousand other investors will take advantage of it instead as soon as they know about it.*

Why it's correct: A comma precedes the coordinating conjunction "or" joining the independent clause beginning with the subject "You" and another beginning with the subject "a thousand."

Correct:

*He didn't see the necessity of lean principles, **nor** would they have made sense in a business model based on inefficiency.*

Why it's correct: A comma precedes the coordinating conjunction "nor" joining the independent clause beginning with the subject "He" and another beginning with the subject "they."

Correct:

*Market forces left them behind, **for** the law of supply and demand isn't necessarily a force for social justice.*

Why it's correct: A comma precedes the coordinating conjunction “for” joining the independent clause beginning with the subject “Market forces” and another beginning with the subject “the law.”

Correct:

*The competition started to heat up, **so** we did everything we could to protect our assets.*

Why it's correct: A comma precedes the coordinating conjunction “so” joining the independent clause beginning with the subject “The competition” and another beginning with the subject “we.”

Exception: If the two independent clauses are short (five words or fewer), the comma may be unnecessary.

Correct:

You bring the wine and we'll make dinner.

Why it's correct: A comma is unnecessary before the coordinating conjunction “and” joining the two short, four-word independent clauses beginning with the subjects “You” and “we.”

How This Helps the Reader

The comma tells the reader to pause a little after one independent clause ends and before the coordinating conjunction signals that another (with a new subject) is joining it to make a compound sentence. In each of the example sentences above, the **independent clause** on either side of the comma-conjunction combination could stand on its own as a sentence. In the first example above, for instance, we could replace the comma and conjunction with a period, then capitalize the *o* in “our,” and both would be grammatically correct sentences. We combine them with a comma and the conjunction *and*, however, to clarify the relationship between the two ideas. The comma signals that these are coordinated clauses rather than noun or verb phrases.

If the subject were the same in both clauses, however, both the comma and subject of the second clause would be unnecessary. In that case, the sentence would just be a one-subject clause with a compound predicate—that is, two coordinated verbs (see Comma Rule 4.4 below). Consider the following examples:

Correct:

We were having the time of our lives and would continue to enjoy that lucky streak.

Why it's correct: The subject “we” is the same in the independent clauses “We were having the time of our lives” and “we would continue to enjoy that lucky streak,” so the comma and second “we” are omitted to make a compound predicate joining the verbs “were having” and “would continue” with the coordinating conjunction “and.”

Correct:

They won the battle but lost the war.

Why it's correct: The subject “They” is the same in the independent clauses “They won the battle” and “they lost the war,” so the comma and second “they” are omitted to make a compound predicate joining the verbs “won” and “lost” with the coordinating conjunction “but.”

What to Look for When Proofreading

Look for run-on sentences (see §5.2.1.2 above), which are sentences that omit a comma before the coordinating conjunction joining two independent clauses. Keep an eye out for the seven coordinating conjunctions *for*, *and*, *nor*, *but*, *or*, *yet*, and *so* (see Table 4.3.2a and use the mnemonic acronym fanboys to remember them). Simply add a comma before the conjunction if the independent clause on either side of the conjunction could stand on its own as a sentence because it has a subject and predicate (see §4.3.1 for more on sentence structure).

Incorrect:

*We were losing money with each acquisition **but** our long-term plan was total market dominance.*

Incorrect:

*We were losing money with each acquisition **but,** our long-term plan was total market dominance.*

The fix:

*We were losing money with each acquisition, **but** our long-term plan was total market dominance.*

In the example above, the coordinating conjunction “but” joins the two independent clauses beginning with the subjects “We” and “Our long-term plan.” Omitting the comma in the first example makes the sentence a run-on. Misplacing the comma after the conjunction in the second miscues the reader to pause after, rather than before, the conjunction. The easy fix is just to add the comma or move it so it goes before the conjunction.

- [Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Comma Rule 1.2: Don't put a comma between independent clauses in a compound sentence if not followed by a coordinating conjunction.

Don't put a comma between two independent clauses if it's not followed by a coordinating conjunction because this is a **comma splice** sentence error (see §5.2.1.1 above). We have two distinct ways of forming a compound sentence (see §4.3.2) and a comma splice confuses the two. One way of making a compound sentence is to join independent clauses by placing a comma and one of the seven “fanboys” coordinating conjunctions between them (see Table 4.3.2a for the coordinating conjunctions). Simply omitting the coordinating conjunction after the comma makes a comma splice. The other way of making a compound sentence is to end the first clause with a semicolon when it doesn't make sense to use any of the coordinating conjunctions to establish a certain relationship between the clauses (see Table §4.3.2b on sentence varieties for more on compound sentences and Semicolon Rule 1 below). Using a comma instead of a semicolon in such compound sentences makes a comma splice.

What to Look for When Proofreading

Look for commas separating two independent clauses (clauses that can stand on their own as sentences because they each have a subject and predicate) without any of the seven coordinating conjunctions (*for*, *and*, *nor*, *but*, *or*, *yet*, or *so*) following the comma.

Incorrect:

The first proposal was from the Davidson group, the second came from a company we hadn't seen before.

The fix:

The first proposal was from the Davidson group; the second came from a company we hadn't seen before.

The fix:

*The first proposal was from the Davidson group; **but** the second came from a company we hadn't seen before.*

The fix:

Though the first proposal was from the Davidson group, the second came from a company we hadn't seen before.

In the incorrect example above, the comma separates two independent clauses that can stand on their own as sentences if you replaced the comma with a period and capitalized the *t* in “the second.” You have three options for fixing the comma splice corresponding to the three examples above:

1. Replace the comma with a semicolon to make a compound sentence.
 2. Add a coordinating conjunction, such as *but*, to make a compound sentence that clarifies the relationship between the clauses.
 3. Add a subordinating conjunction, such as *Though*, at the beginning of the first clause to make it a dependent (a.k.a. a subordinate) clause. This makes the sentence a complex one (see §4.3.2 for more on subordinating conjunctions and complex sentences).
- [Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Comma Rule 2.1: Put a comma after introductory subordinate clauses, phrases, or words preceding main clauses.

Put a comma before the main clause (a.k.a. independent clause) when it is preceded by an introductory word, phrase (e.g., a prepositional or participial phrase), or subordinate clause (a.k.a. dependent clause) in a complex sentence.

Correct:

If we follow our project plan's critical path down to the minute, we will finish on time and on budget.

Why it's correct: The comma separates the subordinate clause beginning with the subordinating conjunction “If” from the main clause (beginning with the subject “we”) that follows it.

Correct:

When my ship comes in, I'll be repaying every favor anyone ever did for me.

Why it's correct: The comma separates the subordinate clause, beginning with the subordinating conjunction “When,” from the main clause that follows it, beginning with the subject “I.”

Correct:

To make ourselves better understood, we've left post-it notes all around the room.

Why it's correct: The comma separates the introductory infinitive phrase, beginning with the infinitive verb “To make,” from the main clause that follows it, beginning with the subject “we.”

Correct:

After the flood, the Poulins took out some expensive disaster insurance.

Why it's correct: The comma separates the introductory prepositional phrase, beginning with the preposition “after,” from the main clause that follows it, beginning with the subject “the Poulins.”

Correct:

Greeting me at the door, she said that I was a half hour early and would have to wait to see the director.

Why it's correct: The comma separates the introductory participial phrase, beginning with the present [participle](#) (Simmons, 2001a) “Greeting,” from the main clause that follows it, beginning with the subject “she.”

Correct:

*The downturn of 2008 now **forgotten**, the investors threw other people's money around like it was 2007 again.*

Why it's correct: The comma separates the introductory absolute phrase, ending with the past [participle](#) (Simmons, 2001a) “forgotten,” from the main clause that follows it, beginning with the subject “the investors.”

Correct:

Delighted, she accepted their offer even with the conditions.

Why it's correct: The comma separates the single-word introductory past-participle [appositive](#) (Simmons, 2001b) “Delighted” from the main clause that follows it, beginning with the subject “she.”

Correct:

Therefore, you are encouraged to submit your timesheet the Friday before payday.

Why it's correct: The comma separates the introductory [conjunctive adverb](#) (Simmons, 2007b) “Therefore” from the main clause that follows it, beginning with the subject “you.”

Correct:

However, there's not much we can do if the patient refuses our help.

Why it's correct: The comma separates the introductory conjunctive adverb “However” from the main clause that follows it, beginning with the subject “you.”

Correct:

Yes, please go ahead and submit your payment.

Why it's correct: The comma separates the single-word introductory interjection “Yes” from the main imperative clause that follows it, the core of which is the verb “go.”

Correct:

Hello, Claude:

Why it's correct: The comma marks the pause between the greeting word and name address in a respectful, semiformal salutation opening email.

Exception: The comma is unnecessary if the introductory dependent clause or prepositional phrase is short (fewer than four words) and its omission doesn't cause confusion.

Correct:

At this point we're not accepting any applications.

Why it's correct: Omitting the comma after the short, three-word prepositional phrase doesn't cause confusion.

How This Helps the Reader

The comma tells the reader to pause a little prior to the main clause as if to say, “Okay, here’s where the sentence really begins with the main-clause subject and predicate.” The main clause is the main point, whereas the subordinate clause that precedes it is relatively minor, providing context.

Recall from the lesson on sentence varieties (§4.3.2) that a complex sentence is one where a subordinating conjunction begins an independent or subordinate clause, which cannot stand on its own as a sentence. A subordinate clause (a.k.a. dependent clause) becomes part of a proper sentence only when it joins a main (a.k.a. independent) clause. When that subordinate clause precedes the main clause, a comma separates them. The same is true when that main clause is preceded by a phrase (e.g., prepositional, infinitive, participial, gerund, etc.) or even just a word such as an appositive participle (as in the “Delighted” example above) or conjunctive adverb, as in the “Therefore” example above.

What to Look for When Proofreading

Look for words, phrases, or clauses preceding the main clause without a comma separating them. For this, you must know how to spot the main clause when it comes later in the sentence; in other words, you need to be able to spot the main grammatical subject (the doer of the action) and predicate (the action itself; review §4.3.1's introduction to sentence structure). If the main subject is preceded by words, phrases, or clauses but not a comma, then you need to add one before the main clause.

Incorrect:

***Because** first impressions are lasting ones you must always come out swinging at the beginning of your presentation.*

The fix:

***Because** first impressions are lasting ones, you must always come out swinging at the beginning of your presentation.*

In the example above, “you” is the main grammatical subject that begins the main clause, whose main verb is “come.” The subordinate clause begins with the subordinating conjunction “Because” and ends at “ones,” so the comma must follow “ones” to separate it from the beginning of the main clause.

- [Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Comma Rule 2.2: Don't put a comma after main clauses followed by subordinate clauses or phrases unless the latter strikes a contrast with the former.

Don't put a comma after a main clause (a.k.a. independent clause) if it is followed by a subordinate (a.k.a. dependent) clause or phrase in a complex sentence. If the subordinate clause begins with a contrasting subordinating conjunction such as “although,” a comma must separate the two clauses.

Correct:

*You can't apply for permits from the city **because** you haven't even secured funding yet.*

Why it's correct: A comma is unnecessary because the subordinate clause, beginning with the subordinating conjunction “because,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*We will finish on time and on budget **if** we follow the critical path of our plan to the minute.*

Why it's correct: A comma is unnecessary because the subordinate clause, beginning with the subordinating conjunction “if,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*I'll be repaying every favor anyone ever did for me **when** my ship comes in.*

Why it's correct: A comma is unnecessary because the subordinate clause, beginning with the subordinating conjunction “when,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*The Poulins took out some expensive disaster insurance **after** the flood.*

Why it's correct: A comma is unnecessary because the prepositional phrase, beginning with the preposition “after,” follows the main clause rather than precedes it, so you can read it without a pause.

Correct:

*We're not accepting any applications at this time, **though** we might make an exception for a truly remarkable applicant.*

Why it's correct: A comma is necessary because the subordinate clause, beginning with the subordinating conjunction “though,” strikes a contrast with the main clause that precedes it, making a pause appropriate.

Correct:

*We could easily hire a new full-time assistant in the fourth quarter, **unless** our profit margin drops below 5% in the third.*

Why it's correct: A comma is necessary because the subordinate clause, beginning with the

subordinating conjunction “unless,” strikes a contrast with the main clause that precedes it, making a pause appropriate.

How This Helps the Reader

The absence of the comma tells the reader to keep reading smoothly without pause between the main and subordinate clauses. In the case of the contrasting subordinate clause, however, the comma signals a pause as if to say that the subordinate clause is a kind of afterthought or qualification added to the main clause.

What to Look for When Proofreading

Look for commas unnecessarily added before subordinating conjunctions (see Table 4.3.2a for a list of subordinating conjunctions) in complex sentences where the subordinate clause follows the main clause and doesn’t strike a contrast with it.

Incorrect:

*The technician is switching to plan B, **because** the manifold blew a gasket.*

The fix:

*The technician is switching to plan B **because** the manifold blew a gasket.*

Incorrect:

*The Goliath Games label was founded in 2003, **to** create the most innovative and progressive interactive entertainment.*

The fix:

*The Goliath Games label was founded in 2003 **to** create the most innovative and progressive interactive entertainment.*

In the examples above, the comma is simply unnecessary and should be deleted. It would be necessary, however, if the first sentence began with the subordinate clause beginning with “Because . . .” or after the infinitive phrase if the second sentence began with “To create . . .” In those cases, the comma would follow “gasket” and “2003,” respectively, and you would change the first letter in the main clauses to lowercase.

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Comma Rule 3.1: Put commas around parenthetical words, phrases, or clauses.

Put commas before and after parenthetical or non-essential words, phrases, or clauses that would leave the sentence grammatically correct if you omitted them. Placed in the middle of a sentence between the subject and predicate or at the end of the sentence, however, those elements lend further detail to the words or phrases that come just before them. Commas in this way function as a lighter form of parentheses.

Correct:

*The promotion went to Mr. Speck, **who** neither wanted nor deserved it, to make it look like something was being done about the glass ceiling.*

Why it's correct: Like parentheses, the commas mark off the relative clause beginning with the relative pronoun “who” in the middle of the sentence, lending more information to the word coming just before (“Mr. Speck”).

Correct:

*Global Solutions went on a hiring spree, **which** was well-timed given the change in telecoms legislation that was about to come down.*

Why it's correct: The comma marks the switch to a restrictive relative clause beginning with the relative pronoun “which” after the main clause, lending more information to its final word, “hiring spree.” The restrictive relative clause is non-essential in the sense that the main clause still means the same thing if the restrictive clause were omitted.

Correct:

*We'll get back to you as soon as possible, **needless to say**.*

Why it's correct: The comma marks the switch to an interjection tacked onto the end of the sentence.

Correct:

*The second customer, **on the other hand**, absolutely loved the new color.*

Why it's correct: The comma marks off a parenthetical prepositional phrase separating the subject from the predicate in the middle of the sentence.

Correct:

*The time for expressing interest in the buy-out option, **however**, had long since passed.*

Why it's correct: The commas mark off the conjunctive adverb “however” interjected between the subject and the predicate in the middle of the sentence.

Correct:

*We've heard that, **in fact**, the delegation won't be coming after all.*

Why it's correct: The commas mark off a parenthetical prepositional phrase interjected between the subject and the predicate in the middle of the sentence.

Correct:

*Always treat the customer with respect, unless of course certain behaviors, **such as belligerent drunkenness**, compel you to take a firm stand against them.*

Why it's correct: The commas mark off a parenthetical phrase offering an example interjected between the subject and the predicate in the middle of the dependent clause.

Correct:

*The nicest thing about you, **Josh**, is that you get the best work out of your employees by only praising achievements rather than criticizing mistakes.*

Why it's correct: The commas mark off a parenthetical appositive address clarifying who “you” is between the subject and the predicate in the middle of the sentence.

Correct:

*I sent the application to Grace Garrison, **the departmental secretary**, last Tuesday.*

Why it's correct: The commas mark off a parenthetical appositive noun phrase identifying the role of the person named.

Exceptions: When the appositive is so close to the noun it modifies that the sentence wouldn't make sense without it, omit the commas. Also omit commas:

- Before *such as* when exemplifying non-parenthetically
- Around restrictive relative clauses (i.e., those beginning with *that*; see Comma Rule 3.6)
- If too many commas would clutter the sentence, in which case you would drop any comma that wouldn't cause confusion if omitted

Correct:

Departmental secretary Grace Garrison received the application Tuesday.

Why it's correct: You can omit commas around the appositive following “Departmental secretary” because “Departmental secretary received the application” wouldn't make sense unless “The” preceded it.

Correct:

*They offer competitive fringe benefits **such as** health and dental coverage, three weeks' paid vacation per year, and sick leave.*

Why it's correct: A comma would be excessive before the “such as” phrase introducing the list of examples unless it appeared as a parenthetical aside in the middle of the sentence.

Correct:

*We don't have to go, and **of course** they don't have to take us.*

Why it's correct: Adding commas around “of course,” though technically correct, would be excessive and look cluttered, so the parenthetical commas drop in priority to the comma separating compounded independent clauses.

How This Helps the Reader

As light alternatives to parentheses, these parenthetical commas tell the reader to pause a little when a non-essential (a.k.a. parenthetical) point is interjected or tacked on to explain the word or phrase preceding it.

Common parenthetical phrases include:

all things considered	however	needless to say
as a matter of fact	in addition	nevertheless
as a result	incidentally	no doubt
as a rule	in fact	of course
at the same time	in my opinion	on the contrary
consequently	in the first place	on the other hand
for example	in the meantime	therefore
furthermore	moreover	under the circumstances

Interestingly, this rule also helped the Atlantic Canada telephone company Bell Aliant cancel a contract with Rogers Communications over the use of telephone poles prior to Rogers’s intended five-year term, costing Rogers a million dollars and resulting in a bitter court battle in 2006. The dispute concerned the following sentence in the middle of the 14-page contract:

This agreement shall be effective from the date it is made and shall continue in force for a period of five (5) years from the date it is made, and thereafter for successive five (5) year terms, unless and until terminated by one year prior notice in writing by either party.

Without the comma after “terms,” you could read the contract as Rogers intended, which was to say that it could be terminated with a year’s notice any time after the first five years. By adding the second comma to make the “and thereafter” phrase parenthetical and therefore non-essential, however, Rogers in effect made the “unless . . .” clause apply to the first five-year term as well as to any subsequent term. That one misplaced comma thus gave Bell Aliant the right to cancel at any time.

Citing this parenthetical comma rule, the Canadian Radio-Telecommunications Commission (CRTC) ruled in favor of Bell Aliant at Rogers’s expense ([Austen, 2006](#)). The CRTC later reversed its ruling when Rogers invoked the less ambiguous French version of the contract to force Aliant to return to its contractual obligations. Still, Rogers ultimately paid heavily for un-recouped losses during the contract’s cancellation and in legal fees throughout the contract dispute, which dragged out till 2009 ([Bowal & Layton, 2014](#)). You can bet Rogers pays people to ensure its contracts are punctuated unambiguously now.

What to Look for When Proofreading

Look for words, phrases, or clauses that could be deleted from a sentence without making it grammatically incomplete. Add commas if none mark off the parenthetical word, phrase, or clause or if the first is there but not the second (or vice versa) in the case of parenthetical elements ending a sentence.

Incorrect:

Emphasizing your spoken points with gesticulation which may sound like a dirty word can certainly help your audience understand them better.

The fix:

*Emphasizing your spoken points with gesticulation, **which may sound like a dirty word**, can certainly help your audience understand them better.*

Here, the non-essential parenthetical relative clause beginning with the non-restrictive relative pronoun “which” and ending with “word,” could be deleted from the sentence and leave it grammatically complete. However, as an interjection, it clarifies the word that precedes it (“gesticulation”), and therefore has a place in the sentence, albeit one set apart from the rest.

Incorrect:

Let’s start cooking Grandpa!

The fix:

*Let's start cooking, **Grandpa!***

Here, the comma is crucial in signaling that Grandpa is being addressed. Without the comma, the sentence recommends preparing Grandpa to be cooked and presumably eaten, which is hopefully not the intended meaning.

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Comma Rule 3.2: Put a comma before contrasting coordinate elements, end-of-sentence shifts, and omitted repetitions.

Put commas before end-of-sentence:

- **Questions** that seek confirmation of the main-clause point by asking the opposite
- **Phrases** that begin with not and state what the main-clause point seeks to correct
- **Coordinate elements** that contrast or further extend the main-clause point

Correct:

*This presentation seems like it's gone on for days, **doesn't it?***

Why it's correct: The comma marks off the question added to the end of the sentence to ask whether the opposite of the main-clause point is true as a way of seeking agreement with it.

Correct:

*Please send the document to Accounts Receivable, **not Payable.***

Why it's correct: The comma marks off the contrasting element added to the end, abbreviating the clause “do not send the document to Accounts Payable,” which has the exact structure of the main clause but shows only the words that differ from the main-clause wording rather than repeating most of it to make a compound sentence.

Correct:

*The potential we envision for AI is that it will at best bring a world of convenience and leisure, **at worst total annihilation.***

Why it's correct: The comma marks off the clause that states the complementary contrast to the first statement by omitting the repeated relative clause root “it will . . . bring.”

Correct:

*The president's statement to the media seemed incoherent, **even demented.***

Why it's correct: The comma marks off the clause that extends the main clause statement assuming the same root structure.

How This Helps the Reader

The comma cues the reader to pause before the sentence shifts to contrasting elements, as well as to indicate that some phrasing from the first part of the sentence is being assumed rather than repeated in the second.

What to Look for When Proofreading

Look for run-on-like gaps where no punctuation separates the main clause from questions or contrasting phrases tacked on to the end of a sentence, and add the comma.

Incorrect:

This is a great time to be alive isn't it?

The fix:

*This is a great time to be alive, **isn't it?***

Here, the main clause ends with “alive,” and the follow-up recasting of the statement as an interrogative sentence (“isn’t this the best time to be alive?”) abbreviated as “isn’t it?” forms a run-on without any punctuation separating it from the main clause. The comma added between the clauses represents the words that were omitted to avoid repetition.

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Comma Rule 3.3: Put a comma before sentence-ending free-modifier phrases that describe elements at the beginning or middle of sentences.

Put commas before phrases that appear at the end of a sentence but modify (describe) actions or things at the sentence’s beginning or middle. As long as such phrases don’t cause confusion with their ambiguity, they are free to either follow the noun they modify or appear at the end.

Correct:

*The MC desperately cued for applause, **clapping aggressively.***

Why it’s correct: The comma marks off the sentence-ending participial phrase starting with the present participle “clapping,” which describes the action “cued” in the middle of the sentence.

How This Helps the Reader

The comma signals to the reader that the phrase ending the sentence refers to something that came earlier in the sentence. Without a comma, the phrase would describe what came immediately before it.

What to Look for When Proofreading

Look for phrases (especially participial phrases—words ending in -ing) at the end of sentences without commas preceding them but not making sense. If they indeed have commas preceding them but the participle could

refer to more than one thing in the main clause, resolve the ambiguity by moving the phrase closer to the thing it modifies.

Incorrect:

The bellhop held out his hand for a gratuity smiling obsequiously.

The fix:

*The bellhop held out his hand for a gratuity, **smiling obsequiously**.*

Here, the omitted comma makes it seem like the gratuity is smiling obsequiously, which doesn't make sense. Adding the comma before "smiling" makes it clear that the bellhop mentioned earlier in the sentence is the one smiling.

Incorrect:

*The MC invited the plenary speaker to the stage, **bowing graciously**.*

The fix:

***Bowing graciously**, the MC invited the plenary speaker to the stage.*

The participial phrase is ambiguous when placed at the end of the sentence because it's unclear whether the MC or plenary speaker is bowing graciously. Moving the participial phrase to the beginning so that it is in appositive relation to the noun it modifies clarifies the sentence to say that the MC is bowing.

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Comma Rule 3.4: Put commas around higher levels of organization in dates, places, addresses, names, and numbers.

Put commas around the:

- Year when preceded by a month and date
- Date when preceded by a day of the week
- Larger geographical region (e.g., province, state, country, etc.) when preceded by a smaller one (e.g., city or town) in a sentence or long address line
- Title or credential (e.g., ND, MD, PhD) following a name
- Groups of thousands in large numbers

Correct:

*The release date of April 14, **2019**, will be honored if there are no delays.*

Why it's correct: The commas mark off the year as parenthetical in the three-part date to ensure that there is no ambiguity about which April 14 (2018? 2020?) is intended.

Correct:

*We agreed to continue our meeting on Thursday, **January 28**, to cover the agenda items we didn't get to on Monday.*

Why it's correct: The commas mark off the calendar date as parenthetical after the day of the week to ensure that there is no ambiguity about which Thursday is intended.

Correct:

*Gord Downie was born in Amberstview, **Ontario**, to a traveling salesman father and stay-at-home mother.*

Why it's correct: The commas mark off the province as parenthetical after the smaller town to ensure that there is no ambiguity about which town is intended, assuming other towns in other provinces may share the same name.

Correct:

*Bowie was born David Robert Jones in London, **England**, on 8 January 1947.*

Why it's correct: The commas mark off the country as parenthetical after the city within it to ensure that there is no ambiguity about which city is intended (i.e., not the one in Ontario, Canada).

Correct:

*Send your inquiries to 1385 Woodroffe Avenue, **Ottawa**, ON K26 1V8.*

Why it's correct: The commas mark off the larger geographical region in which the street is situated.

Correct:

*Please welcome Daria Rimini, **RN**, to the department.*

Why it's correct: The commas mark off the person's credentials as non-essential to her name rather than initials in her name.

Correct:

*Send your inquiries to Albert Irwin, **Jr.**, at the email address below.*

Why it's correct: The commas mark off the generational tag following the name.

Correct:

*You can always trust old George Wilson, **Professor of English**, to make a mountain of a molehill.*

Why it's correct: The commas mark off the individual's professional title following their name.

Correct:

*The awards for damages ranged anywhere from a token **\$4,882** to a whopping **\$13,945,718**.*

Why it's correct: The commas mark off every group of thousand (three digits) to help the reader quickly recognize the magnitude of the number without counting the number of digits.

Exceptions: Don't surround a year with commas if it follows only a month; use them only around years following a month and date. Also, drop the second comma if the larger geographical region is possessive in form.

Correct:

Recording began in November 2005 and continued to February 2006.

Why it's correct: Commas are unnecessary in general two-part dates.

Correct:

*The charm of London, **Ontario's** street buskers almost rivals that of its UK namesake.*

Why it's correct: A comma following the possessive form of the larger geographical region would look even more awkward than this. Of course, the sentence could be reworded as “The street buskers’ charm in London, Ontario, almost”

How This Helps the Reader

The commas tell the reader to pause a little within a detailed series of time, geographical, or name designations when adding a higher order of organization just as commas were used as light alternatives to parentheses in Comma Rule 3.1.

What to Look for When Proofreading

Look for years added to three-part dates, larger geographical regions added after cities and towns, or credentials added after names with either no comma added on either side of that year, region, or credential or added only before it but not after. Add both or the second comma. If the date only has the month and year, but a comma or two surrounds the date, delete commas.

Incorrect:

We can probably fit you in for the procedure on Tuesday December 12.

The fix:

*We can probably fit you in for the procedure on Tuesday, **December 12**.*

Here, the month and date follow the day of the week without a comma. Just add one between them.

Incorrect:

*They moved the release date to March 14, **2020** to allow enough time for post-production.*

The fix:

*They moved the release date to March 14, **2020**, to allow enough time for post-production.*

Here, the year gets the first of its two parenthetical commas but not the second, so just add one after the year.

Incorrect:

*The company was founded in July, **1978**, to address an urgent need.*

The fix:

The company was founded in July 1978 to address an urgent need.

The commas around the year are unnecessary because it's only a two-part date. Just delete them.

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Comma Rule 3.5: Put a comma between a signal phrase and a quotation.

Put commas between signal phrases and the quotations they introduce when the signal phrases end with a verb that gives rise to the quoted words or thoughts.

Correct:

*The chair of the meeting **shouted**, “We cannot proceed unless we have order.”*

Why it’s correct: A comma separates the signal phrase ending with a verb from the quotation it introduces.

Correct:

*“Stay the course,” the supervisor **advised**, “and you shall soon find success.”*

Why it’s correct: The parenthetical commas mark off the signal phrase interjected between quoted clauses.

Correct:

*You could tell she was **thinking**, “Is this guy for real?”*

Why it’s correct: A comma separates the signal phrase ending with a verb from the quotation it introduces even if the quotation is merely thought rather than said.

Exception: A comma is unnecessary if the signal phrase ends with the restrictive relative pronoun *that* or the quotation is a phrase incorporated into the sentence rather than a sentence or clause on its own.

Correct:

*The customer service rep said **that** “The offer expired on August 23, not the 24th” and they have a “no exceptions” policy due to the perishable nature of the product.*

Why it’s correct: The signal phrase ends with the restrictive relative pronoun *that*, which a comma doesn’t follow but could replace, and “no exceptions” is a phrase rather than a clause or sentence.

Correct:

The customer service representative confirmed “August 23, not the 24” was the expiration date.

Why it’s correct: No comma follows the signal phrase because the quotation is just a phrase excerpt rather than a clause or sentence.

How This Helps the Reader

The comma cues the reader to pause as it abbreviates the relative pronoun *that*, which makes the comma unnecessary if it’s included.

What to Look for When Proofreading

Look for missing commas around quotations and add them between the signal phrase ending with a verb and the quotation, or look for unnecessary commas that split a sentence unnaturally, such as going before or after the *that* that precedes a quotation if present, and delete them.

Incorrect:

*The authorization **said** “Go for it.”*

The fix:

*The authorization **said**, “Go for it.”*

Here, the signal phrase omits a comma between the main verb and the quotation, so adding one corrects the error.

Incorrect:

*The current contract says clearly **that**, “overtime is time and a half.”*

The fix:

*The current contract says clearly **that** “overtime is time and a half.”*

Here, a comma unnecessarily follows the relative pronoun *that*, perhaps because the writer thought that a comma should always precede the quotation. You could either delete the comma or “that,” but not both.

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Comma Rule 3.6: Don't put commas around restrictive relative clauses (before *that*).

Don't put a comma before a restrictive relative clause (e.g., beginning with the relative pronoun *who* or *that*) following a main clause.

Correct:

The stocks that we all thought were going to offer the best returns are doing the worst.

Why it's correct: No commas surround the restrictive clause from “that” to “returns,” which is somewhat parenthetical in that the sentence could grammatically function without it (“The stocks are doing the worst”). However, this would be misleading because it implies that all the stocks are failing expectations, whereas the sentence focuses on only a subset. The vagueness resulting from omitting the restrictive clause proves that it is essential to the sentence's clarity.

Correct:

The students who presented first set the bar high for those who followed.

Why it's correct: No commas surround the restrictive clause from “who” to “first.” The clause is restrictive because it specifies a small group of students. Adding commas around the clause would make it non-restrictive (see Comma Rule 3.1 above) and would change the meaning of the sentence: it would mean that all the students presented first.

Correct:

She didn't say that we couldn't work together.

Why it's correct: No comma precedes the restrictive clause beginning with “that.”

How This Helps the Reader

The absence of the comma tells the reader that the relative clause starting with the relative pronoun *that* or *who* is essential to the meaning of the sentence and should be read smoothly without pauses around it.

What to Look for When Proofreading

Look for commas preceding *that* or *who* and determine whether the meaning of the sentence would be significantly changed if you deleted the restrictive relative clause. If it would be, delete the commas.

Incorrect:

*You don't have to cite common-knowledge facts, **that** every source you can find agrees on.*

The fix:

You don't have to cite common-knowledge facts that every source you can find agrees on.

Here, the restrictive relative clause beginning with *that* is essential to the meaning because it clarifies what kind of facts are common knowledge. It is not interchangeable with the non-restrictive relative clause beginning with *which*, which requires a comma before it because it is non-essential (see Comma Rule 3.1 above). In the UK, writers often use “which” instead of “that” even in non-restrictive relative clauses without the comma preceding them. In North America, however, we distinguish the relative clause types by using a comma and *which* for non-restrictive clauses and *that* without a comma for restrictive clauses.

Incorrect:

*The students, **who** were caught plagiarizing, were each given a zero, whereas the rest did quite well.*

The fix:

The students who were caught plagiarizing were each given a zero, whereas the rest did quite well.

Here, the commas in the incorrect sentence say that all students were caught plagiarizing. Deleting the commas to make “who were caught plagiarizing” a restrictive relative clause brings the sentence back to the intended meaning, which is that a subset of students were caught plagiarizing and the rest did well.

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Comma Rule 3.7: Don't put commas between subjects and their predicates.

Don't put a comma between a clause's subject (even if it's a long one) and predicate (the main verb action) if there are no parenthetical elements between them.

Correct:

Participants who quit smoking because of the new treatment option were twice as likely to remain smoke-free as those who quit cold turkey.

Why it's correct: No comma separates the subject “Participants who . . . option” from the predicate “were . . . turkey” even though the subject is quite long at ten words.

Exception: Adding a pair of commas between the subject and predicate is acceptable when they are divided by an interjection. See the fourth and fifth correct examples illustrating Comma Rule 3.1.

How This Helps the Reader

The absence of the comma tells the reader to read smoothly across the subject and predicate because they are the integral parts of a unified clause even if the subject is long.

What to Look for When Proofreading

Look for commas that separate the subject from the predicate when there are no parenthetical words or phrases, or non-restrictive clauses, separating them. For this, you must know how to spot the main-clause subject and predicate and delete any stray commas that come between them.

Incorrect:

All the businesses that benefited from the new regulatory environment following the passing of Bill 134, have given back to their community.

The fix:

All the business that benefited from the new regulatory environment following the passing of Bill 134 have given back to their community.

The subject of the above sentence is a long one because, following the core noun “businesses,” it contains a restrictive relative clause beginning with *that*, which contains prepositional phrases (“from the new . . .” and “of Bill 134”) and a participial phrase (“following . . .”). None of these length-extending units change the fact that there is no legitimate parenthetical interjection requiring commas between the subject and the predicate that begins with “have given.” The easy fix is just to delete the comma.

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Comma Rule 4.1: Put commas between each item in a series, including the last two items.

Put commas between each item in a series, including before the *and* or *or* that separates the second-to-last (a.k.a. penultimate) and last items, whether those items be words, phrases, or even clauses in a series.

Correct:

*NASA sent the space shuttles Columbia, Challenger, Discovery, Atlantis, **and** Endeavour on 135 orbital missions from 1982 to 2011.*

Why it’s correct: A comma follows each noun in a series up to the penultimate one before the *and* joining the last two.

Correct:

*I gave them the option of either researching the content, preparing the PowerPoint, **or** doing the actual presentation.*

Why it’s correct: A comma follows each participial phrase in a series up to the penultimate one before the *or* joining the last two.

Correct:

*The presenters rehearsed before Week 5, during Reading Week, **and** again after Week 7.*

Why it’s correct: A comma follows each prepositional phrase in a series up to the penultimate one before the *and* joining the last two.

Correct:

Mick Jagger and Keith Richards set the stage for other singer-guitarist power duos like Robert Plant and Jimmy Page, Freddie Mercury and Brian May, Steven Tyler and Joe Perry, Axl Rose and Slash, and Anthony Kiedis and John Frusciante.

Why it's correct: A comma follows each compound noun phrase in a series up to the penultimate one before the *and* joining the last two pairs.

Correct:

I can't stand comma splices, you have no patience for run-ons, and she won't tolerate sentence fragments.

Why it's correct: In a compound sentence containing three independent clauses, a comma follows each clause up to the penultimate one before the *and* joining the last two.

How This Helps the Reader

The serial commas help separate each item in the series, and the one that comes before the coordinating conjunction and that joins the last two items (a.k.a. the “Oxford comma”) helps resolve various ambiguities that may arise without it (see some below). The question of whether to use the Oxford comma has been a long-running debate. Some style guides, such as the Canadian Press and Associated Press, and even institutions like Algonquin College recommend omitting it because they advocate for as few commas as possible. However, they say nothing about situations where omitting the Oxford comma creates unavoidable ambiguity—that is, two interpretations that mean two very different things. The anti-Oxford comma side even has an anthem in the Grammy-winning indie band Vampire Weekend’s 2008 debut-album single “Oxford Comma,” which opens with the lyric “Who gives a f**k about the Oxford comma?”



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However, grammarians, readers, and writers who care about clarity in writing, and even the plaintiffs awarded \$5 million in a US civil suit (as well as the defendants paying the price), certainly care about the Oxford comma. The significant confusion and even conflict that results from its absence in clutch situations justifies its inclusion in all. For instance:

- In a 2017–2018 civil case that went nearly as far as the US Supreme Court, Oakhurst Dairy of Portland, Maine, was ordered to pay its delivery drivers \$5 million due to the ambiguity caused by an omitted Oxford comma in state law. The law was soon amended to separate the last two items in a list of overtime pay exemptions to resolve the ambiguity ([Victor, 2018](#)).
- The inclusion or omission of the Oxford comma leads to two entirely different interpretations when

names are listed. If you were to say, for instance, that you and two others must go to court, you would say, “Beth, Ian, and I must go to court.” Without the Oxford comma, however, you would be addressing Beth (who now isn’t going to court) to tell her that just you and Ian are going: “Beth, Ian and I must go to court,” which is not what you originally meant.

- Appositive relations between items in a series also create ambiguities when omitting the Oxford comma. If an actor winning a big award in front of a national audience were to say, “I would like to thank my parents, God and Buffy Sainte-Marie,” the absence of an Oxford comma makes “God and Buffy Sainte-Marie” appear to be an appositive noun phrase modifying “parents”—that is, she would imply that her parents are God and Buffy Sainte-Marie. By using the Oxford comma, she avoids this absurdity by thanking three entities: her parents, God, and Buffy Sainte-Marie—as intended.
- Omitting the Oxford comma is especially confusing if the items listed are a combination of paired and single items. If the list of pairs in the fourth correct example above omitted the Oxford comma, it would end with the absurdity of having the last four items appearing as singles with “and” awkwardly separating each: “. . . Steven Tyler **and** Joe Perry, Axl Rose **and** Slash **and** Anthony Kiedis **and** John Frusciante.” Knowing the context of these pairings would help resolve the ambiguity, but if you were reading a list of unknown mixed single and paired items, you wouldn’t know which was a single and which was a pair near the end without the Oxford comma. A list such as “A, B and C, D, E and F, G, H, I, J and K and L” would be ambiguous because you wouldn’t know if the last three items paired J with K (and L is single) or K with L (and J is single).

If the Oxford comma is necessary to avoid ambiguity in such cases, it should be used as a rule in *all* cases. Writers shouldn’t have to make a subjective judgment call about whether the reader would find it ambiguous with or without the Oxford comma because some readers are more astute than others. Except perhaps in titles where brevity is highly valued and no ambiguities of the kind listed above can confuse the reader, the Oxford comma should *always* be used.

What to Look for When Proofreading

Look for a list of three or more words, phrases, or clauses in a sentence. If you don’t see a comma before the *and* that separates the last two items, add one there.

Incorrect:

Our group is full of non-contributors, my friend and me.

The fix:

*Our group is full of non-contributors, my friend, **and** me.*

Omitting the Oxford comma in the incorrect example above suggests that you and your friend are non-contributors because “my friend and me” are in appositive relation to “non-contributors.” Though you did not mean to say this, you are in effect offering yourself and your friend as particular examples of non-contributors. By adding the Oxford comma, however, you now say that the group is comprised of you, your

friend, and some non-contributors. With the Oxford comma, you and your friend are productive members rather than non-contributors despite being grouped with them.

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Comma Rule 4.2: Put commas between two or more coordinate adjectives.

Put commas between two or more coordinate adjectives that refer to the same noun. **Coordinate adjectives** are those stacked in front of a noun in no particular order to describe the noun in multiple ways. You can tell that they're coordinate adjectives if you can (1) change their order and (2) add *and* between each without changing the meaning either way.

Correct:

The new hires turned out to be dedicated, ambitious employees.

Why it's correct: Both adjectives, “dedicated” and “ambitious,” describe the noun “employees” in no particular order, and you can replace the comma with an *and* to make “. . . dedicated and ambitious employees.”

Correct:

Would you like a nice, new, clean, dry diaper?

Why it's correct: All four coordinate adjectives describe the noun “diaper” in no particular order.

Correct:

The incessant, thunderous drum beat changed the rhythm of their hearts.

Why it's correct: The comma goes between “incessant” and “thunderous” because they are coordinate. The comma doesn't go between “thunderous” and “drum” because they are non-coordinate in that you can't change their order and add *and* between them without changing the meaning.

Correct:

Use SMS for brief, fast text message exchanges.

Why it's correct: The comma goes between “brief” and “fast” because they are coordinate. The comma doesn't go after “fast,” “text,” or “message” because they are non-coordinate in that you can't change their order and add *and* between them without changing the meaning.

How This Helps the Reader

The commas distinguish coordinate from non-coordinate adjectives and therefore what adjectives are incidental and which are intrinsic qualities of the noun they describe. For more, see [Comma Tip 6: Use Commas Correctly with a Series of Adjectives](#) (Simmons, 2018a).

What to Look for When Proofreading

Look for a series of two or more adjectives preceding a noun without commas between them. If you can put

and between them and change their order without changing the meaning of the sentence, they're coordinate adjectives that need commas between them.

Incorrect:

The day started off with a vicious unrelenting freezing rain.

The fix:

The day started off with a vicious, unrelenting freezing rain.

The only adjectives that could be swapped around and have *and* added between them are “vicious” and “unrelenting.” The adjective “freezing” is locked in its position before the noun “rain” to mean the type of rain that makes the outside one huge ice rink. Therefore, you need to add a comma between “vicious” and “unrelenting,” but not between “unrelenting” and “freezing.”

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Comma Rule 4.3: Don't put a comma after the final coordinate adjective.

Don't put a comma after the second of two (or third of three, etc.) coordinate adjectives—i.e., between the final coordinate adjective and the noun it describes. See Comma Rule 4.2 above for a further explanation of coordinate vs. non-coordinate adjectives.

What to Look for When Proofreading

Look for coordinate adjectives preceding a noun with commas between them. If you can put *and* between them and change their order without changing the meaning of the sentence, they're coordinate adjectives that need commas between them.

Incorrect:

Select and use common, basic, information technology tools to support communication.

The fix:

Select and use common, basic information technology tools to support communication.

The only adjectives that could be swapped around and have *and* added between them are “common” and “basic.” In this case, “information technology” (a.k.a. “IT”) is a noun phrase that modifies the noun “tools,” so their order is locked in, making them non-coordinate.

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Comma Rule 4.4: Don't put a comma between non-coordinate adjectives.

Don't put commas between non-coordinate adjectives—that is, between adjectives that are in a fixed order before the noun they modify and cannot have *and* added between them without changing the meaning of the sentence. See Comma Rule 4.2 above for a further explanation of coordinate vs. non-coordinate adjectives.

What to Look for When Proofreading

Look for coordinate adjectives preceding a noun with commas between them. If you can't put *and* between them and change their order without changing the meaning of the sentence, they're non-coordinate adjectives. Any commas between them must be deleted.

Incorrect:

Send the black, Pearl, drum kit to the heavy, metal drummer.

The fix:

Send the black Pearl drum kit to the heavy metal drummer.

The order is important in the first set of non-coordinate adjectives describing the noun “kit” because the type of kit we’re dealing with is a drum kit, so “drum” must come immediately before “kit.” The brand of drum kit is Pearl (capitalized because it is a proper noun), so “Pearl” precedes “drum kit.” The only adjective preceding these non-coordinate adjectives is “black,” but it is unaccompanied by another to make it a coordinate adjective, so there are no commas. Likewise, inserting a comma between “heavy” and “metal” splits the musical genre “heavy metal” serving as a non-coordinate adjective to “drummer,” so it misleadingly implies that the drummer is a 400 kg lead statue.

Comma Rule 4.5: Don't put commas between two coordinate nouns or verbs.

Don't put commas between two nouns (or noun phrases) or verbs (or verb phrases) joined by the coordinating conjunction *and* in a compound subject, predicate, or object.

What to Look for When Proofreading

Look for commas appearing before or after the coordinating conjunction *and* when it comes between nouns (or noun phrases) or verbs (or verb phrases), then delete them.

Incorrect:

The communications director from your company, and the same from our company met to discuss a common strategy.

The fix:

The communications director from your company and the same from our company met to discuss a common strategy.

The above sentence features a **compound subject**, meaning that two subjects (the two communications directors) perform the main action (“met”). Though each is followed by a prepositional phrase (“from . . .”), the comma between them must be deleted in the incorrect sentence to avoid impeding the reader.

Incorrect:

They applied for an extension, and worked all weekend on the report.

The fix:

They applied for an extension and worked all weekend on the report.

The sentence above has a **compound predicate**, meaning that the one subject (“They”) performed two actions (“applied” and “worked”). Again, the comma is unnecessary between them and must be deleted from the incorrect sentence. The comma would be necessary if the second verb had a different subject performing the action, in which case they would be two independent clauses in a compound sentence (see Table 4.3.2b and Comma Rule 1.1).

Incorrect:

*They can't expect us to write both the report and memo, **and** not pay us.*

The fix:

*They can't expect us to write both the report and memo **but** not pay us.*

The above sentence also has a **compound predicate** (“can’t expect” and “not pay”). Adding a comma makes this out to be a compound sentence, which it isn’t because the subject “They” is common to both actions. To avoid an “X and Y and Z” structure caused by having a compound object (“report and memo”) appearing just before the conjunction coordinating the second verb, the “and” joining the two verb phrases can simply be changed to “but.”

Incorrect:

*The teacher gave us a new deadline based on the revised schedule, **and** a slightly revised end-of-semester timeline.*

The fix:

*The teacher gave us a new deadline based on the revised schedule **and** a slightly revised end-of-semester timeline.*

The above sentences have a **compound object**, meaning that two objects (“deadline” and “timeline”) are acted upon by the verb “gave.” The objects here are in somewhat long noun phrases, but to add a comma between them (after “schedule”) would mislead the reader into thinking that this is a compound sentence with a new independent clause following “and.” Deleting the comma would ensure that the reader understands the sentence instead as a simple sentence with a compound object.

For more on commas, see the following resources:

- [The Punctuation Guide’s Comma page](#) (Penn, 2011a)
- [The Grammar Book’s Commas page](#) and its [Commas Quiz 1](#) and [Commas Quiz 2](#) (Straus, 2018a)

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5.3.2: Apostrophes

Apostrophes are mainly used to indicate possession and contraction but are probably the most misplaced punctuation mark after commas. They can embarrass the writer who misuses them, show a lack of attention to detail, and confuse readers about whether a noun is singular or plural, possessive, a contraction, or just a

misspelling. Used properly, apostrophes at the end of a noun cue readers that the noun following is possessed by what the noun preceding refers to. For instance, in “Uncle Tom’s cabin,” the apostrophe indicates that the cabin (noun) is owned by Uncle Tom. Placement of apostrophes before or after the *s* ending a word determines if the noun is plural or singular. They’re also used for contractions in informal writing such as you see at the beginning of this sentence. You have four main rules to follow when using apostrophes, as well as several special cases.

Quick Rules: Apostrophes

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common apostrophe errors associated with each one.

Apostrophe Rule 1.1	Put an apostrophe before the <i>s</i> ending a singular possessive noun. <i>Jenna’s goal is to find a money manager who can diversify her portfolio.</i>
Apostrophe Rule 1.2	Don’t put an apostrophe at the end of a simple plural noun. <i>Corben put on his glasses to see the looks on their faces.</i> (no apostrophe at the end of “glasses,” “looks,” or “faces”)
Apostrophe Rule 2.1	Put an apostrophe after the <i>s</i> ending a plural possessive noun. <i>All three companies’ bids for the contract were rejected.</i>
Apostrophe Rule 2.2	Don’t put an apostrophe before the <i>s</i> ending a non-possessive plural decade. <i>The corporation was in the black back in the 1940s.</i> (no apostrophe between the <i>o</i> and <i>s</i> in “1940s”)
Apostrophe Rule 3	Put an apostrophe where letters are omitted in contractions. <i>You’re saying that it’s not a mistake if they’re doing it twice?</i>
Apostrophe Rule 4	Put an apostrophe before a plural <i>s</i> following single letters. <i>Mind your p’s and q’s, son.</i>

Extended Explanations

Apostrophe Rule 1.1: Put an apostrophe before the *s* ending a singular possessive noun.

Put an apostrophe before the *s* added to the end of a singular noun when the noun or noun phrase following belongs to the noun preceding it. In the case of joint ownership in compound nouns (when two or more nouns have joint possession of the noun following), the apostrophe-*s* goes only at the end of the second or final noun.

Correct:

*Have you heard the story of Albert **Einstein’s** brain?*

Why it’s correct: The brain belongs to Einstein (singular), so the apostrophe and *s* indicate possession.

Correct:

*Grace **Jones’s** formidable presence in **1985’s** *A View to a Kill* electrified audiences.*

Why it's correct: The “formidable presence” belongs to Grace Jones. Though her name ends with an *s*, she is grammatically singular and therefore receives an apostrophe and *s* just like any other singular noun. The apostrophe and *s* are also added to the end of years to indicate that the noun following (in this case a James Bond film) occurred in that year.

Correct:

*I've always heeded my **brother-in-law's** financial advice.*

Why it's correct: The apostrophe and *s* are added to the end of a compound noun.

Correct:

***Reznor and Ross's** first soundtrack won a 2010 Oscar for Best Original Score.*

Why it's correct: The apostrophe and *s* are added to the end of the final noun in cases of joint possession. Saying “Reznor’s and Ross’s first soundtrack” would refer to solo soundtracks by each.

How This Helps the Reader

The apostrophe before the *s* signals to the reader that the preceding singular noun is in possession of the noun or noun phrase following. To test whether you are dealing with a case of possession, you can flip the order and insert “of the” between the nouns or noun phrases. In the first example above where the brain belongs to Einstein, for instance, “the brain of Einstein” is a wordier equivalent of “Einstein’s brain” but confirms possession.

What to Look for When Proofreading

Look for *s* added to the end of words when your intention is to show possession but you’ve omitted the apostrophe, making the word look like a simple plural. Add the apostrophe. Also, in cases where an apostrophe is added to the very end of a singular noun that ends in *s* to show possession (see the second correct example above), add another *s* rather than imply that the singular noun is plural.

Incorrect:

Mr. **Davis' companies proposals** request is for a 33% funding increase.

The fix:

Mr. **Davis's company's proposal's** request is for a 33% funding increase.

The incorrect sentence above contains three apostrophe errors:

- The company belongs to Mr. Davis, who is just one person and is therefore grammatically singular despite having a name ending in *s*. Perhaps the writer heard that you can't have an “s's” due to pronunciation concerns, but usually we pronounce this *Day-viss-ez* to indicate possession. Thrown by this and confusing the singular and plural possessive forms, the writer who omits the *s* may cause the same confusion can avoid doing so by adding it.
- The proposal belongs to the company, but the apostrophe is omitted and the plural form of company

(“companies”) is given instead of “company’s.” The error is likely due to the fact that the plural noun and singular possessive noun forms are **homophones**—they sound exactly alike but are spelled differently and mean different things (see homophone.com for several examples of such homophones). Correcting this is a simple matter of replacing “ies” with “y’s” at the end of the word.

- Finally, the request is in the proposal and thus belongs to it. Omitting the apostrophe makes the plural noun “proposals,” and fixing it is just a matter of adding the apostrophe before the final *s*.

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Apostrophe Rule 2.1: Put an apostrophe after the *s* ending a plural possessive noun.

Put an apostrophe after the *s* at the end of a plural noun (a noun of two or more people, places, or things) when the noun or noun phrase following belongs to it.

Correct:

*The two **companies**’ merger was finalized last month.*

Why it’s correct: The apostrophe goes at the end of the plural noun “companies” to indicate that the noun following (“merger”) belonged to both.

Correct:

*The **Joneses**’ family tradition includes rescuing ancient artifacts from dastardly villains.*

Why it’s correct: The apostrophe is added to the end of “Joneses,” the plural of the surname “Jones,” meaning each individual Jones family member is in joint possession of the noun phrase following (“family tradition”).

Correct:

*I listed having had three **years**’ experience in C++ coding on my résumé.*

Why it’s correct: The apostrophe comes at the end of the plural “years” to indicate that the noun following happened in those years. This is a more concise alternative to saying “three years of experience.”

Exception: When the plural form of the noun is irregular in that it doesn’t end in *s* (e.g., “feet,” “children,” “men,” “mice,” “teeth”), use the singular possessive apostrophe-*s*.

Correct:

*Can you please point me to the **men**’s room?*

Why it’s correct: The singular possessive apostrophe-*s* form is added to the end of an irregular plural noun that doesn’t end in *s* to indicate possession.

How This Helps the Reader

The apostrophe after the *s* tells the reader to read the noun as being a plural in possession of the noun or noun phrase following, as opposed to the apostrophe before the *s* signaling a singular possessive.

What to Look for When Proofreading

Look for plural words that end in *s* being in possession of the noun following without an apostrophe at the end or the apostrophe added before the *s*. Either add the apostrophe to the end of the word or move it there.

Incorrect:

*We've been granted two **months** grace.*

Incorrect:

*We've been granted two **month's** grace.*

The fix:

*We've been granted two **months'** grace.*

Here, the grace period belongs to the two months (plural), so omitting the apostrophe is incorrect because it leaves “months” as a simple plural. The apostrophe-*s* ending is also incorrect because it makes “month” singular, which disagrees with the “two” preceding. To correct these errors, the apostrophe must go after the *s* at the end of “months.”

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Apostrophe Rule 2.2: Don't put an apostrophe before the *s* ending a non-possessive plural decade

Don't put an apostrophe between the *l* and *s* when writing a plural decade that's not possessive (e.g., 1990s). Put an apostrophe at the end only if the decade is in possession of the noun or noun phrase following.

Correct:

*The **1980s'** main contribution to popular music was excessive cheesy synthesizers.*

Why it's correct: The apostrophe follows the plural decade (meaning everything that happened from January 1, 1981, to December 31, 1990) to show possession of the noun phrase “main contribution.” You could also say, “The main contribution of the 1980s to popular music was . . .”

Correct:

***1980's** Academy Award for Best Picture went to Ordinary People.*

Why it's correct: The apostrophe precedes the *s* to mean that the event following happened in the year 1980.

How This Helps the Reader:

The apostrophe after the *s* signals to the reader that the noun or noun phrase following happened in the decade given. Some mistakenly put an apostrophe between the *l* and *s* when referring to the simple plural of a decade (e.g., 1990's), but this conflicts with the singular possessive form of the year (see the “1980's” example above). If the decade were also possessive, “1990's's” (with two apostrophes—one before and one after the *s*) would look awkward. The non-possessive apostrophe between the *l* and *s* is probably confusing the rule that places

the contraction apostrophe before the last two digits of the year or decade (see the third example in Apostrophe Rule 3 below).

What to Look for When Proofreading

Look for an apostrophe-s added to the end of a decade and delete the apostrophe if the decade (or year at the beginning of the decade) isn't in possession of the following noun or noun phrase.

Incorrect:

*The **1990's** were a colorful decade in men's fashion.*

The fix:

*The **1990s** were a colorful decade in men's fashion.*

*The **'90s** were a colorful decade in men's fashion.*

In the incorrect sentence above, “1990’s” is the singular possessive form of “1990,” meaning something belonging to the year 1990 should follow it rather than a verb. Perhaps the writer confused “1990’s” with the contraction “’90s.” The apostrophe before the s must be deleted to make the simple plural “1990s,” meaning all the years from 1991 to 2000 inclusive.

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Apostrophe Rule 3: Put an apostrophe where letters are omitted in contractions.

Put an apostrophe wherever letters and characters (including spaces) have been omitted in contractions. **Contractions** are two (sometimes more) words combined into one word to represent the way they're often said quickly as one word in informal speech. In the examples below, the contractions would be incorrect if formal writing were expected by the audience but are correct as informal writing.

Correct:

***There's** going to be a huge reckoning when markets adjust, and it **won't** be pretty.*

Why it's correct: The first apostrophes replace the omitted *i* in “There is” and the second for the *o* in “will not.”

Correct:

*I **wouldn't've** have said that if I knew you were sensitive about your nose.*

Why it's correct: The apostrophes replace the omitted *o* and *a* in the three-word phrase “would not have” contracted into one word.

Correct:

***She's** been **bangin'** out hit records since the '70s.*

Why it's correct: The apostrophes replace the omitted space and *ha* in “She has,” final *g* in “banging,” and *19* in “1970s.”

Correct:

***It's** a pretty bad cold, sure, but **'sbeen a while** and **'tis** the season, as they say.*

Why it's correct: The apostrophes replace the omitted space and *i* in the contraction for “It is,” *it ha* in “it has been,” and first *i* in “it is.”

Exceptions: Many contractions at the far end of informality typically omit even contractions.

Correct:

*I'm gonna get me a cold beer when this **shift's** over.*

Why it's correct: The first apostrophe replaces the omitted space and *a* in “I am,” and the second replaces the space and *i* in “shift is.” As a convention in the writing of *gonna* as a contraction of “going to,” apostrophes aren't used to replace the omitted *i*, *g*, *t*, and *o*.

How This Helps the Reader

The apostrophe replaces omitted letters in contractions and thus signals informal writing meant to represent the way we speak words informally, though they would be unacceptable in formal writing. Some common contractions that often confuse readers because they are homophones with other words include:

Table 5.3.2: Commonly Confused or Misspelled Contractions

Contraction	Meaning	Not	Meaning
can't	cannot	cant	slang
could've	could have	could of	("of" confused with "have")
I'd	I would	Id	agent of instinct to Freud
I'm	I am	Im	Cockney for "him"
it's	it is	its	possessive pronoun
I've	I have	Ive	(misspelled)
let's	let us	lets	a form of the verb <i>to let</i>
o'clock	of the clock	oclock	(misspelled)
should've	should have	should of	("of" confused with "have")
there's	there is / was	theirs	possessive pronoun
they're	they are	there / their	pronoun / possessive pronoun
we're	we are / were	were	a form of the verb <i>to be</i>
where's	where is / was	wears	a form of the verb <i>to wear</i>
who's	who is / was	whose	possessive pronoun
who're	who are / were	whore	prostitute
would've	would have	would of	("of" confused with "have")
you're	you are / were	your	possessive pronoun

For a more exhaustive set, see the [List of English contractions](#) (Wikipedia, 2018).

What to Look for When Proofreading

Look for the absence of apostrophes in contractions and add them. Your spellchecker will help catch these in most cases (see Figure 5.1.4.8 above), but you must be especially careful in seeking them out if your spellchecker has any difficulty. Ensure also that you always use the form of apostrophe that looks like a small superscript “9,” not “6” (the opening of single quotation marks; see Quotation Marks Rule 2) especially when placed at the beginning of words or numbers.

Incorrect:

Its not like there gone to kick us out if im late and your hammered.

The fix:

It's not like they're gonna kick me out if I'm late and you're hammered.

The many errors in the incorrect sentence can be corrected in the following ways:

- *It's* (for “it is”) is meant rather than the third-person possessive pronoun *Its*
- *they're* (for “they are”) is meant rather than the pronoun *there*
- *gonna* (for “going to”) is meant rather than “gone to”
- *I'm* (for “I am”) is meant rather than “im”
- *you're* is meant rather than the possessive pronoun “your”

Incorrect:

*I **cant** imagine life without '70's rock **'n** roll.*

The fix:

*I **can't** imagine life without '70s rock **n'** roll.*

The errors in the incorrect sentence can be corrected in the following ways:

- *can't* (for “cannot”) is meant rather than *cant*, meaning “slang.”
- *'70s* (for *1970s* with the apostrophe like a superscript “9”) is meant rather than the opening single quotation mark (like a superscript “6”); the trick to getting the correct direction of apostrophe is to type any letter first, then the apostrophe to orient it in the form appearing as a small superscript “9,” and then go back to delete the letter in front of it
- *n'* (for “and”) is meant rather than the opening single-quotation mark (like a superscript “6”) appearing before the *n*; an apostrophe replacing the *a*, in addition to the one for *d*, is seen as excessive

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Apostrophe Rule 4: Put an apostrophe before a plural *s* following single letters.

Put an apostrophe wherever adding an *s* to make a simple plural would be confusing, such as pluralizing a single letter.

Correct:

*As my mom always said, “Mind your **p's** and **q's**, dot your **i's**, and cross your **t's**.”*

Why it's correct: The apostrophes help form the plurals of the lowercase letters when they would otherwise look confusing as “ps” and “qs” or ambiguous as “is.”

Correct:

*I'm aiming for straight **A's** this semester.*

Why it's correct: The apostrophe helps form the plural of the uppercase letters when it would otherwise look ambiguous as “As.”

How This Helps the Reader

The apostrophe helps the reader see these as plural forms of letters rather than as misspellings or typos.

What to Look for When Proofreading

In the rare case of using a plural form of a letter, separate the letter and its *s* with an apostrophe if you have omitted it.

Incorrect:

*You need to practice rolling your **rs** if you want to nail the Italian accent.*

The fix:

*You need to practice rolling your **r's** if you want to nail the Italian accent.*

In the example above, omitting the apostrophe makes the plural of the letter *r* appear as a typo.

For more on apostrophes, see the following resources:

- [The Punctuation Guide's Apostrophe page](#) (Penn, 2011b)
- [The Grammar Book's Apostrophes page](#) and its [Apostrophes Quiz 1](#) and [Apostrophes Quiz 2](#) (Straus, 2014a)

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5.3.3: Colons

Colons and semicolons are often confused because of the similarities in both their names and form, though they perform quite different punctuation roles. A colon looks like a period stacked on top of another and is mainly used to equate information on either side of it somewhat like an equals sign (=) in math. A semicolon, on the other hand, looks like a period stacked on top of a comma. The semicolon usually separates independent clauses from one another in a compound sentence as an alternative to using a comma and a conjunction. They both have additional specific uses as we shall see below, starting with the colon.



Quick Rules: Colons

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common colon errors associated with each one.

Colon Rule 1.1	Put a colon at the end of a clause or phrase introducing a list. <i>NASA built six space shuttles: Enterprise, Columbia, Challenger, Discovery, Atlantis, and Endeavour.</i>
Colon Rule 1.2	Put a colon at the end of an opening salutation in formal emails and letters. <i>Dear Ms. O'Reilly:</i>
Colon Rule 2.1	Put a colon between an explanation and its introductory independent clause. <i>The error in our prototype led to the solution of quite another problem: how to stabilize the transducer.</i>
Colon Rule 2.2	Put a colon between a quotation and its introductory independent clause if the latter is a complete sentence. <i>What they were actually saying was much simpler: "Either give us the money up front, or we won't install the program."</i>
Colon Rule 2.3	Don't put a colon before a list or explanation preceded by a fragment. <i>Their three best albums are Fully Completely, Day for Night, and Trouble at the Henhouse. (no colon after "are")</i>
Colon Rule 3.1	Put a colon between a main title and its subtitle. <i>In the Realm of Hungry Ghosts: Close Encounters with Addiction</i>
Colon Rule 3.2	Put a colon between publisher locations and names in bibliographical references. <i>Toronto: Nelson</i>
Colon Rule 3.3	Put a colon between numbers in ratios and times. <i>There's a 3:1 chance that the experiment will end before the 8:23:40 mark.</i>

Extended Explanations

Colon Rule 1.1: Put a colon at the end of a clause or phrase introducing a list.

Put a colon after a clause or phrase that introduces a list formatted either as a series separated by commas in the sentence or a bulleted or numbered stack down the page.

Correct:

We're going to need some branded stationery: business cards for all associates, letterhead and memo templates, post-it notes, pens, and USB sticks.

Why it's correct: The colon ends an independent clause (complete with a subject and predicate) that introduces a list arranged within the sentence.

Correct:

To find the date of a web page that doesn't otherwise have one:

1. Type "inurl:" into the Google Search field, then copy and paste the URL of the web page whose date you're looking for immediately after it
2. Hit Enter and add "&as_qdr=y15" to the end of the search result URL in the address bar above the results

page, which should show the title of the web page whose date you're looking for, but without the date yet

3. *Hit Enter again and you'll see the date appear in gray font below the web page title in the updated results list*

Why it's correct: The colon ends an infinitive phrase that, as a dependent clause, is completed by each imperative sentence in the numbered list of procedural steps arranged down the page.

How This Helps the Reader

The colon cues the reader to read the information following as a list of items in parallel delivering on the promise made in the clause or phrase preceding it.

What to Look for When Proofreading

Look for lists either in sentence form with each item separated by a comma or in the form of a numbered or bulleted list. If no colons separate the introductory clauses or phrases from the lists that follow, add them. If semicolons or commas introduce the lists (see Semicolon Rule 3 below), replace them with colons.

Incorrect:

Four obstacles infuriate me on my rush to class through the hallways; inattentive people texting while walking, slow walkers, people who stop suddenly as if there's no one behind them, and 4–5 people walking side-by-side, taking up the whole hallway.

The fix:

Four obstacles infuriate me on my rush to class through the hallways: inattentive people texting while walking, slow walkers, people who stop suddenly as if there's no one behind them, and 4–5 people walking side-by-side, taking up the whole hallway.

In the example above, the writer made the common mistake of confusing a semicolon for a colon. Fixing it is a simple matter of replacing one with the other. See the example correct sentence for Colon Rule 2.1 below for a handy mnemonic for getting the right punctuation in these cases.

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Colon Rule 1.2: Put a colon at the end of an opening salutation in formal emails and letters.

Put a colon at the end of the opening salutation line where you address the recipient by name at the opening of a formal email or letter. In a semiformal email, a comma at the end of the salutation is fine. If an email is formal, however, a comma follows the greeting word (e.g., *Hello*) and the colon follows the recipient's name.

Correct:

Greetings, Greta:

Why it's correct: The colon following the semiformal email's opening salutation cues the recipient (Greta) to read the message following it.

Correct:

Dear Mrs. Jackson:

Why it's correct: The colon following the formal letter's opening salutation cues the recipient (Mrs. Jackson) to read the message following it.

Exception: In an informal message, a comma following the recipient's name (but not the greeting word) strikes a more casual tone in the opening salutation.

Correct:

Hi Hank,

Why it's correct: The comma following the informal message's opening salutation cues the recipient (Hank) to read the message following it.

How This Helps the Reader

The colon cues the reader to read the message following the salutation that addresses them by name.

What to Look for When Proofreading

Look for either no punctuation used at the end of an opening salutation address or other punctuation inappropriate for the occasion, such as a comma in a letter's salutation, or incorrect, such as a semicolon.

Incorrect:

Dear Mr. Bobrowsky,

Incorrect:

Dear Mr. Bobrowsky;

The fix:

Dear Mr. Bobrowsky:

In the first incorrect example, a comma used at the end of an opening salutation addressing the reader in a letter is too informal for the given channel. This suggests to the professional reader that the writer isn't up to date on business letter writing conventions. Modern business writers use a colon instead of a comma. Worse, the semicolon suggests that the writer is confused about the respective roles of colons and semicolons despite having had ample opportunity to learn them throughout their English-speaking lives.

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Colon Rule 2.1: Put a colon between an explanation and its introductory independent clause.

Put a colon after an independent clause followed by a statement that explains in further detail what the introductory clause states in general. An independent clause is one that can stand on its own as a sentence

beginning with a capital and ending with a period because it expresses a complete thought with a subject (doer) and a predicate (action; see §4.3.1 above). This colon usually stands for the causal transition phrase “—that is,”

Correct:

Imagining the colon elongating into an equals sign (=) is a useful way to remember what it does: equate information on either side of it.

Why it’s correct: The independent clause ends with a colon and the verb phrase following explains what “does” means. Since the material to the right of the colon is a verb phrase rather than a complete sentence, the *e* in “equate” remains lowercase.

How This Helps the Reader

The colon cues the reader to read the phrase or clause to the right of the colon as an explanation of what the clause to the left of it says.

What to Look for When Proofreading

Look for combination statement-explanation sentence structures with either no punctuation between them or the wrong punctuation, such as a semicolon, comma, or long dash (em dash).

Incorrect:

You have only one option left—delete the corrupted file from your hard drive and download the last version you saved to the cloud.

The fix:

You have only one option left: delete the corrupted file from your hard drive and download the last version you saved to the cloud.

In the incorrect sentence above, the writer made the common mistake of using the long dash as multipurpose punctuation for any pause you hear in speech. Fixing the sentence is a simple matter of replacing the long dash with a colon. You could alternatively add “that is,” between the long dash and “delete,” but the colon makes for a more concise sentence with two fewer words.

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Colon Rule 2.2: Put a colon between a quotation and its introductory independent clause if the latter is a complete sentence.

Put a colon after an independent clause that introduces a quotation. Like the clause followed by an explanation in Colon Rule 2.1 above, it must be a complete clause that can stand on its own before the colon and quotation.

Correct:

The first joke he told was a groaner of the highest order: “What did the fish say when you put him in his tank? . . . Hey, how do you drive this thing?”

Why it’s correct: The quotation is introduced by an independent clause that ends with a colon, whereas a signal phrase that ends with a verb such as “said” is followed by a comma.

How This Helps the Reader

The colon cues the reader to read the quotation to the right of the colon.

What to Look for When Proofreading

Look for quotations preceded by a complete independent clause. If they don’t have a colon separating them from the quotation, add one. Also, look for colons used to set up quotations when a comma is more appropriate, such as if the last word before the quotation is a verb, which would make the clause preceding the colon incomplete. In such cases, you would either replace the colon with a comma or rephrase the introductory fragment to make it an independent clause.

Incorrect:

Mama called the doctor and the doctor said: “No more monkeys jumping on the bed.”

The fix:

Mama called the doctor and the doctor said, “No more monkeys jumping on the bed.”

The fix:

Mama called the doctor and the doctor gave her an ultimatum: “Look, if another one of your children falls off the bed and gets a concussion, I’ll be reporting you to the Children’s Aid Society.”

In the example above, the clause preceding the colon and quotation is a compound with a fragmentary second clause missing an object after the transitive verb “said,” whereas it would have to be a complete independent clause to use a colon. Correcting it would be a simple matter of replacing the colon with a comma (see Comma Rule 3.5 above). Alternatively, you could make the introductory clause a complete and independent one, meaning it could stand on its own as a sentence, then use a colon before the quotation.

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Colon Rule 2.3: Don't put a colon before an explanation or quotation preceded by a fragment.

Don’t put a colon before an explanation or list if the clause that precedes it is not an independent one—that is, if it cannot stand on its own as a sentence.

What to Look for When Proofreading

Look for colons ending phrases or incomplete clauses with lists or explanatory statements following and simply

delete them or rephrase the incomplete clause as a complete one. The incorrect sentence at the end of Colon Rule 2.2 above exemplifies an incomplete clause preceding a quotation; below is one preceding a list:

Incorrect:

***The remaining tasks include:** picking up the birthday cake, putting up the streamers, and wrapping the presents.*

The fix:

***The remaining tasks include** picking up the birthday cake, putting up the streamers, and wrapping the presents.*

The fix:

***The following tasks remain:** picking up the birthday cake, putting up the streamers, and wrapping the presents.*

In the example above, the colon ends an incomplete clause—incomplete because it has a subject and only half of the predicate. The verb “include” is [transitive](#), which means that an object (a thing acted upon by the verb) must follow it (Simmons, 2007a). The objects here are [gerunds](#), which are verbs in noun form ending in -ing (Simmons, 2018b), and are all on the other side of the colon, so the colon can just be deleted. Alternatively, the incomplete clause can be completed by changing the subject to “The following tasks” to set up the list and changing the verb to the intransitive “remain”—[intransitive](#) because it *doesn't* take an object (Simmons, 2008).

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Colon Rule 3.1: Put a colon between a main title and its subtitle.

Correct:

The Gutenberg Galaxy: The Making of Typographic Man.

Why it's correct: The colon separates main title from subtitle.

How This Helps the Reader

The colon distinguishes what should be known as the main title of the book, film, report, assignment, etc. Often this is a catchy, snappy handle for what to call it. The subtitle usually provides a little more practical information about what the work is about.

What to Look for When Proofreading

Look for titles that have any punctuation other than colons between main titles and subtitles. Often the cover of a book positions the subtitle below the main title and in a smaller font, in which case a colon must be added when transcribing the title into a document.

Incorrect:

Amusing Ourselves to Death / Public Discourse in the Age of Show Business.

The fix:

Amusing Ourselves to Death: Public Discourse in the Age of Show Business

In the example above, the absence of punctuation separating the main title from the subtitle on the cover may have prompted the writer to make one up by using a slash. The convention for representing main titles and subtitles, however, is to separate them with a colon.

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Colon Rule 3.2: Put a colon between publisher locations and names in bibliographical references.

Correct:

Toronto: ECW.

Why it's correct: The colon separates location and publisher.

How This Helps the Reader

The colon is merely a convention for separating the publisher location and name. Readers like to know if the book is published in the major centers like New York or London or if they're more local like Toronto or Vancouver.

What to Look for When Proofreading

Look for the part in bibliographical references of books where the publisher information is given. If any punctuation other than a colon separates them, replace it with a colon.

Incorrect:

New York, Random House.

The fix:

New York: Random House.

In the example above, the comma is non-standard punctuation separating the city where the book publisher is based and the name of the publisher. It must be replaced with a colon.

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Colon Rule 3.3: Put a colon between numbers in ratios and times.

Put a colon between numbers in mathematical ratios and to separate hours, minutes, and seconds when indicating time.

Correct:

A globe scaled 1:50,220,000 (or 790 miles to the inch) is one you can grip in the palm of your hand.

Why it's correct: The ratio colon indicates the relative size difference between the model (given as 1 here) and the real thing, which in this case is over fifty million times bigger than the model.

Correct:

Clocking in at 3:24:56, that film was three hours, twenty-four minutes, and fifty-six seconds too long.

Why it's correct: The colons divide units of time into hours, minutes, and seconds. After seconds, decimal-periods are used for fractions of seconds.

How This Helps the Reader

The colon expresses mathematical relationships and the division of units between numbers in a space-efficient manner.

What to Look for When Proofreading

Look for ratios and times to ensure that a colon is being used and that there are no spaces between it and the numbers on either side.

Incorrect:

My first marathon time was 3: 22: 15 and my second was a slower 3.26.44.

The fix:

My first marathon time was 3:22:15 and my second was a slower 3:26:44.

In the example above, errors in spacing and using non-standard punctuation are easily corrected by deleting spaces between the numbers and colons in the first time written and using colons instead of periods in the second.

For more on colons, see the following resources:

- [The Punctuation Guide's Colon page](#) (Penn, 2011c)
- [The Grammar Book's Colons page](#) and its [Semicolons and Colons Quiz 1](#) and [Semicolons and Colons Quiz 2](#) at the bottom (Straus, 2015a)

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5.3.4: Semicolons

Semicolons and colons are often confused because of the similarities in both their names and form, though they perform quite different punctuation roles. A semicolon looks like a period stacked on top of a comma and is mainly used to separate independent clauses from one another in a compound sentence as an alternative to using a comma and a conjunction. A colon, on the other hand, looks like a period stacked atop another and is mainly used to equate information on either side of it somewhat like an equals sign (=) in math. They both have additional specific uses as we saw above with colons in §5.3.3 above and will now see with semicolons.



Quick Rules: Semicolons

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common semicolon errors associated with each one.

Semicolon Rule 1	Put a semicolon between related independent clauses to make a compound sentence. Yes, we finished the marketing report you asked for; it's printed and bound in your departmental mailbox.
Semicolon Rule 2	Put a semicolon between sub-lists in a series of lists in a sentence. <i>Italicize words, phrases, and clauses for emphasis or when you refer to them as such; the titles of books, albums, feature-length films, and websites; and ships, named aircraft, and other named vehicles.</i>
Semicolon Rule 3	Don't put a semicolon where a colon should be used. <i>We can be thankful for what Oscar taught us: that being kind to our canine companions brings immense joy to our lives. (colon used after "us" to set up an explanation, not a semicolon)</i>

Extended Explanations

Semicolon Rule 1: Put a semicolon between related independent clauses to make a compound sentence.

Put a semicolon between independent clauses whose content is so closely related that it makes sense to keep them in the same sentence, though they have different grammatical subjects (doers of the action). An independent clause is one that can stand on its own as a complete sentence because it has a subject (doer) and predicate (action). A compound sentence joins two independent clauses either with a comma and coordinating conjunction (and, but, so, etc.; see Table 4.3.2a) or with a semicolon. Doing neither would make a run-

on sentence, and using only a comma between the clauses would make a comma splice. Use a semicolon in compound sentences where none of the seven coordinating conjunctions is appropriate to use or where you need to be as concise as possible and can do without the conjunction without sacrificing clarity.

Correct:

The new website is nearly ready to launch; we just need to set some SEO controls and publish it.

Why it's correct: The semicolon joins the independent clause beginning with the subject “The new website” and the other with the subject “we.” Both could stand on their own as sentences but are closely related enough to be in the same sentence.

How This Helps the Reader

The semicolon helps the reader see where one clause ends and another (with a different grammatical subject) begins. It also signals that these are two closely related ideas worth joining in the same sentence.

What to Look for When Proofreading

Look for compound sentences punctuated with anything other than a semicolon (e.g., a comma, which makes a comma splice) or with no punctuation at all between them. For this you really must know sentence structure well enough to spot the grammatical subject of a main (a.k.a. independent) clause so that you can tell if a second subject begins a new independent clause within a sentence but without the necessary punctuation preceding it. Review §4.3.1 on sentence structure if you need a refresher.

Incorrect:

We would like to see less personal cellphone use from employees during working hours, however you can of course use your cellphone in an emergency.

The fix:

We would like to see less personal cellphone use from employees during working hours; however, you can of course use your cellphone in an emergency.

The incorrect sentence above is a comma splice because it uses only a comma to separate two independent clauses (see Comma Rule 1.2). The error is easier to spot if you imagine deleting the conjunctive adverb *however*. Replacing the comma with a semicolon and adding a comma after the conjunctive adverb easily fixes the problem.

Incorrect:

You can put the meeting in the calendar make it so we get a notification the day before.

The fix:

You can put the meeting in the calendar; make it so we get a notification the day before.

The incorrect sentence above is a run-on sentence because it contains two independent clauses without any punctuation between them. Adding a semicolon quickly makes the sentence a properly punctuated compound sentence.

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Semicolon Rule 2: Put a semicolon between sub-lists in a series of lists in a sentence.

Use semicolons as “super commas” between groups of items in a long list of items arranged in a sentence.

Correct:

Please send T4s to Brenda, Albert, and Joan in Accounting; Jeremy, Lorraine, and Drew in Marketing; and Jasmine, Lily, and Alphonso in Legal.

Why it’s correct: The semicolon acts as a “super comma” that separates three sub-lists of three employees each according to their respective department in an office.

How This Helps the Reader

The semicolon helps the reader see subgroups within a long list that would be confusing if it included *ands* between the two last items in each subgroup throughout.

What to Look for When Proofreading

Look for sentences that contain long lists and see if there are internal groupings that can be separated with semicolons rather than commas.

Incorrect:

She was a kind mother, sister, and daughter, a dedicated public servant, business owner, and campaigner for progressive issues, as well as a kind soul with an insatiable curiosity, a brilliant mind, and a big heart.

The fix:

She was a kind mother, sister, and daughter; a dedicated public servant, business owner, and campaigner for progressive issues; as well as a kind soul with an insatiable curiosity, a brilliant mind, and a big heart.

In the incorrect example above, the long list of items is internally organized into groups of family and professional roles, as well as personal qualities. To help the reader follow these divisions as they switch from one group to another, the semicolon acts as a “super comma.”

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Semicolon Rule 3: Don’t put a semicolon where a colon should be used.

Don’t use semicolons as if they were interchangeable with colons. They are different punctuation marks performing different functions. Review the semicolon rules above and compare with §5.3.3 on uses for colons.

What to Look for When Proofreading

Look for semicolons and determine if they are being used appropriately in the manner described in the rules

above or if they are actually performing the functions of colons explained and exemplified in §5.3.3 above. You can jump straight to every instance of a semicolon throughout your document by performing a word search (Ctrl + f) and just typing in a semicolon (;).

Incorrect:

Please send notifications to the following people; your family, friends, employer(s), legal representative(s), and financial planner(s).

The fix:

Please send notifications to the following people: your family, friends, employer(s), legal representative(s), and financial planner(s).

In the incorrect example above, the semicolon is being used to introduce a list of items, which is the function of a colon (see Colon Rule 1). Simply replacing the semicolon with a colon corrects the error.

For more on colons, see the following resources:

- [The Punctuation Guide's Semicolon page](#) (Penn, 2011d)
- [The Grammar Book's Semicolons page](#) and its [Semicolons and Colons Quiz 1](#) and [Semicolons and Colons Quiz 2](#) at the bottom (Straus, 2014b)

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5.3.5: Parentheses

Parentheses are often confused with brackets because they look alike and perform similar functions. Parentheses are curved lines that surround qualifying, non-essential elements, whereas brackets are squared, open-ended boxes used for very specific parenthetical situations. Let's take a closer look at the occasions for which we would use parentheses rather than brackets or even commas.



Quick Rules: Parentheses

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common parentheses errors associated with each one.

Parentheses Rule 1.1	Put parentheses around qualifying interjections of lesser importance within and between sentences. <i>He put the folder (the green one, not the blue) in the filing cabinet thinking it was a client file rather than an administrative one.</i>
Parentheses Rule 1.2	Don't use parentheses where parenthetical commas would do. <i>He put the green folder, not the blue one, in the filing cabinet.</i> (commas used instead of parentheses)
Parentheses Rule 2	Put parentheses around in-text citations crediting research sources in APA and MLA documentation styles. Cellphones are giving youths neck and back problems typically seen in much older people (Cuéllar & Lanman, 2017).

Extended Explanations

Parentheses Rule 1.1: Put parentheses around qualifying interjections of lesser importance within and between sentences.

Use parentheses around interjections within a sentence where using parenthetical commas would lead to confusion. You can also use parentheses around an entire sentence that offers an aside that helps explain something said in the sentence previous. Parentheses always come in pairs: an **opening parenthesis** signals the beginning of an interjection of lesser importance, and a **closing parenthesis** signals the return to the sentence proper. When used around an entire sentence, the closing parenthesis goes *after* the sentence-ending period; otherwise, it goes before.

Correct:

We called pest control to get our office back from the vermin (silverfish, mites, house flies, fruit flies, and spiders) that seem to have taken up residency this past year.

Why it's correct: The parentheses mark off a list that digresses from the main point of the sentence with a series of illustrative examples. Parentheses are a better alternative to parenthetical commas because they would confuse the reader with two different types of commas: parenthetical and series.

Correct:

I've come around in my opinion of the common house centipede. (I used to squash them at first sight.) It turns out that they're effective pest control agents themselves.

Why it's correct: The parentheses mark off a whole sentence as a slightly digressive aside interrupting the flow of the main point.

How This Helps the Reader

The parentheses guide the reader toward reading the words, phrases, and clauses surrounded by them as being of lesser importance but still offering insight into what comes immediately before them.

What to Look for When Proofreading

Look to make sure that the parentheses you use genuinely set off words, phrases, or clauses that help explain those that came before them and that the parentheses both open and close. If you use parentheses around a whole sentence, ensure that the closing parenthesis goes to the right of the period rather than to the left.

Incorrect:

I know house centipedes, scutigera coleoptrata, are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

Incorrect:

I know house centipedes (scutigera coleoptrata, are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The fix:

I know house centipedes (scutigera coleoptrata) are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The incorrect example above uses parenthetical commas to set off the Latin name of the insect referred to in the first clause, then uses a Rule 1.1 comma to crowd the area with commas. Parentheses would be more appropriate here, as well as in the second incorrect example that omits the closing parenthesis. The second sentence also places the parenthetical element at the end of the clause rather than where it should be: immediately after the common name of the insect it explains.

Incorrect:

The next time you see a house centipede stuck in your bathtub, throw it a lifeline. (Don't try to pick it up; they're extremely fragile and fall apart at the slightest touch). Just rest one end of a meter stick on the edge of the tub and put the other end inside so the little guy can use it as a ramp to climb up and out.

The fix:

The next time you see a house centipede stuck in your bathtub, throw it a lifeline. (Don't try to pick it up; they're extremely fragile and fall apart at the slightest touch.) Just rest one end of a meter stick on the edge of the tub and put the other end inside so the little guy can use it as a ramp to climb up and out.

The incorrect sentence places the closing parenthesis to the left of the period ending the parenthetical sentence; if the parenthetical sentence were deleted along with the parentheses, the period would be stranded between sentences. Correcting this involves simply moving the period so it goes to the left of the closing parenthesis.

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Parentheses Rule 1.2: Don't use parentheses where parenthetical commas would do.

Don't overuse parentheses, especially where parenthetical commas would be more appropriate. Recall that, according to Comma Rule 3.1, commas can surround parenthetical, non-essential words, phrases, and clauses

added to explain immediately what came before. Whether you use commas or parentheses, the sentence must make grammatical sense without the interjected element. The problem with overusing parentheses, however, is that it clutters up your writing with distracting asides, so the less conspicuous comma is preferable in situations where a parenthetical element doesn't need full parentheses.

What to Look for When Proofreading

Look to make sure that the parentheses you use can't be replaced with commas without causing confusion. In other words, if the parenthetical element follows Comma Rule 3.1 and doesn't involve other types of commas covered by the other rules, then use commas instead of parentheses.

Incorrect:

At the same time, the market dropped a few thousand points (which wouldn't have been so bad if it didn't stay down for so long), so no one was buying anything.

The fix:

At the same time, the market dropped a few thousand points, which wouldn't have been so bad if it didn't stay down for so long, so no one was buying anything.

The incorrect example above includes a restrictive relative clause beginning with *which*, which is a perfect example of a non-essential parenthetical clause that we saw being set off from the main clause in Comma Rule 3.1 above. In this case, commas would be better to use than parentheses.

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Parentheses Rule 2: Put parentheses around in-text citations crediting research sources in APA and MLA documentation styles.

Correct:

Others argue that “text neck” is neither a true epidemic nor even a true ailment (Skwarecki, 2018), just as “book neck” was never a condition that concerned anyone.

Why it's correct: The parentheses mark off an APA-style in-text citation.

How This Helps the Reader

The parentheses tell the reader that the quotation, paraphrase, or summary came from the author or authors named within the parentheses. The reader can then consult the References section at the end of the document and easily find the full bibliographical reference for that source by searching out the same author last name in the alphabetical list of source authors. When citing multiple works by the same author, the year of publication in the citation allows the reader to distinguish between them.

What to Look for When Proofreading

Look to make sure that you use parentheses rather than brackets if your documentation style is APA or MLA. IEEE, on the other hand, does use brackets, albeit with a numerical citation rather than author and year.

Incorrect:

“Text neck” results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books [Shoshany, 2015].

The fix:

“Text neck” results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books (Shoshany, 2015).

The incorrect sentence above uses brackets rather than parentheses to mark off an in-text citation. Use parentheses for APA or MLA in-text citations.

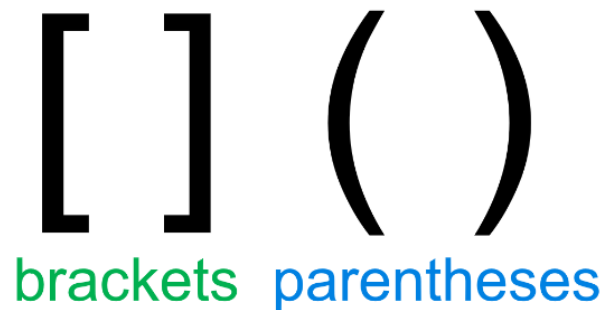
For more on parentheses, see the following resources:

- [The Punctuation Guide’s Parentheses page](#) (Penn, 2011e)
- [The Grammar Book’s Parentheses and Brackets page](#) and its [Question Marks, Quotation Marks, and Parentheses Quiz 1](#) linked at the bottom (Straus, 2014c)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.6: Brackets

Brackets are often confused with parentheses because they look alike and perform similar functions. Brackets are squared open-ended boxes used for more specific parenthetical situations than their curved-line counterparts. Let’s take a closer look at the occasions for which we would use brackets rather than parentheses.



Quick Rules: Brackets

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common bracket errors associated with each one.

Brackets Rule 1.1	Put brackets around changes or additions to the wording of quotations. <i>He clearly wrote that “The contract [was] for \$1.2 million [CDN] over five years” back in 2012.</i>
Brackets Rule 1.2	Don’t put brackets around what should have parentheses. <i>There’s no law of physics (at least not technically) that keeps top athletes from running the 100m in under 9 seconds. (parentheses appropriate instead of brackets)</i>
Brackets Rule 2	Put brackets around parenthetical elements within parentheses. <i>We didn’t have a clue what was causing the issue (we scoured the troubleshooting manual [Brulé, 2012]), so they shut it down.</i>
Brackets Rule 3	Put brackets around numerical in-text citations crediting research sources when required to use IEEE style. <i>Cellphones are giving youth neck and back problems typically seen in much older people [1].</i>

Extended Explanations

Brackets Rule 1.1: Put brackets around changes or additions to the wording of quotations.

Correct:

The president tweeted that “All of the phony T.V. commercials against [him were] bought and payed [sic] for by SPECIAL INTEREST GROUPS.”

Why it’s correct: The first brackets change the original “me are” to “him were” to be consistent with the third-person orientation and past-tense verb in the signal phrase. The bracketed “[sic]” indicates that the quotation’s spelling mistake was in the original source and intentionally kept rather than introduced by the writer when repeating the quotation.

How This Helps the Reader

The brackets indicate what changes the writer makes to a quotation, whether to lend clarity to the original wording or to make it grammatically consistent with the sentence around it. Doing so shows a concern for both quoting accurately and writing correctly. Sneaking in some changes to a quotation to suit your purposes is called misquoting. Sometimes the additions draw attention to errors in the original, such as corrections to the spelling or the use of “[sic],” short for the Latin *sic erat scriptum* (“thus was it written”), to preserve the author’s error.

What to Look for When Proofreading

Ensure that quotations are exact transcriptions of the original to avoid misquoting. If you find any intentional changes, surround them with brackets. Ensure also that any errors in the original quotation are preserved but identified with “[sic]” immediately following.

Incorrect:

Apple's 1997 slogan encourages you to "Think different" by using their computers for outside-the-box solutions.

The fix:

Apple's 1997 slogan encourages you to "Think different [sic]" by using their computers for outside-the-box solutions.

The fix:

Apple's 1997 slogan encourages you to "Think different[ly]" by using their computers for outside-the-box solutions.

The incorrect example above contains a quotation that is grammatically incorrect in its original form. Adding "[sic]" ensures the reader that the critical writer is well aware that, with "think" being a verb, "different" would have to be the adverb "differently" to be correct. Adding the -ly ending in brackets takes a more corrective approach to the error.

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Brackets Rule 1.2: Don't put brackets around what should have parentheses.

What to Look for When Proofreading

Ensure that the brackets you use don't follow either of the parentheses rules explained in §5.3.5 above.

Incorrect:

I know house centipedes [scutigera coleoptrata] are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The fix:

I know house centipedes (scutigera coleoptrata) are ugly, but I'm sure you would much rather have them in your home than the vermin they feed on.

The incorrect example above mistakenly uses brackets around the parenthetical Latin name of the insect identified just before by its common name. Following Parentheses Rule 1.1, however, you would just replace the brackets with parentheses.

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Brackets Rule 2: Put brackets around parenthetical elements within parentheses.

Use brackets whenever you have parenthetical elements within a phrase or clause that is already surrounded by parentheses.

Correct:

Though "text neck" is controversial (some argue that it was only ever a chiropractors' marketing gimmick [Skwarecki, 2018]), it makes sense that neck strain sustained for several hours daily harms our musculoskeletal health.

Why it’s correct: The brackets mark off an in-text citation within a parenthetical statement. If not within parentheses, the citation would be framed by parentheses instead of brackets.

How This Helps the Reader

Brackets help the reader keep track of nested parenthetical elements. Switching to brackets for parenthetical elements within parentheses also helps avoid the awkwardness of “double-chin” parentheses such as “)).”

What to Look for When Proofreading

Look to make sure that you don’t double up parentheses with “))” anywhere in your document.

Incorrect:

The snake-oil rhetoric of Dr. Fishman’s website undermines the credibility of his “text neck” concept (with a chronic lack of proper citations for research supporting his claims (Fishman, 2018)).

The fix:

The snake-oil rhetoric of Dr. Fishman’s website undermines the credibility of his “text neck” concept (with a chronic lack of proper citations for research supporting his claims [Fishman, 2018]).

In the incorrect sentence above, parentheses are used within parentheses. Simply replace the inner parentheses with brackets.

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Brackets Rule 3: Put brackets around IEEE-style numerical in-text citations crediting research sources.

Correct:

Physiopedia recommends holding up your mobile device so that it’s level with your eyes and avoiding “prolonged static postures” [4].

Why it’s correct: The brackets mark off an IEEE-style numerical in-text citation.

How This Helps the Reader

The brackets tell the reader that the quotation, paraphrase, or summary came from the research source numbered within the brackets. The reader can then consult the References section at the back and easily find the full bibliographical reference for that source by the corresponding number.

What to Look for When Proofreading

Look to make sure that you use brackets rather than parentheses if your documentation style is IEEE, as opposed to APA or MLA, which use parentheses.

Incorrect:

Shoshany argues that “Text neck” results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books (5).

The fix:

Shoshany argues that “Text neck” results from people straining their necks hunched over cellphones for several more hours per day, and thousands more per year, than they would if they were just reading books [5].

In the incorrect example above, parentheses are used rather than brackets to mark off an in-text citation. The correct in-text citation style for IEEE is to use brackets instead.

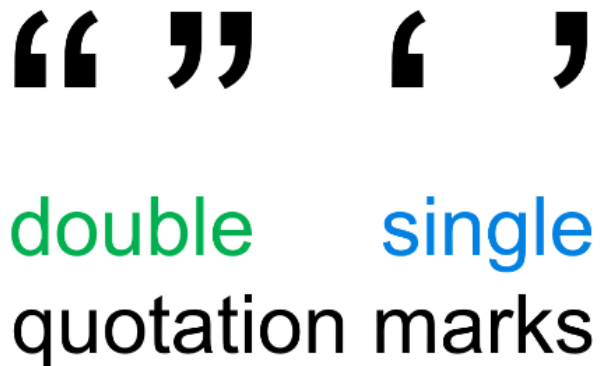
For more on brackets, see the following resources:

- [The Punctuation Guide’s Brackets page](#) (Penn, 2011f)
- [The Grammar Book’s Parentheses and Brackets page](#) and [Question Marks, Quotation Marks, and Parentheses Quiz 1](#) linked at the bottom (Straus, 2014c)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.7: Quotation Marks

Quotation marks are mostly used to set reported speech or text apart from the author’s words. They essentially say, “These are someone else’s words, not mine.” But some writers confuse double quotation marks (simply called “quotation marks” here) with single quotation marks, as well as misplace punctuation around quotation marks, so let’s focus on when and how to use quotation marks, as well as single quotation marks, properly. Since the absence of quotation marks when using research sources in your document can result in plagiarism, knowing how to use them correctly is vitally important to your success as a student and professional.



Quick Rules: Quotation Marks

Click on the rules below to see further explanations, examples, advice on what to look for when proofreading, and demonstrations of how to correct common quotation mark errors associated with each one.

Quotation Marks Rule 1.1	Use quotation marks to indicate reported speech or text. <i>She said, “Put the G-8320 form on the shared drive,” not in your personal Dropbox, “so that it’s available to all the associates.”</i>
Quotation Marks Rule 1.2	Use quotation marks in pairs to begin and end a quotation.
Quotation Marks Rule 1.3	Use a comma between a verb (or verb phrase) introducing a quotation and the quotation itself.
Quotation Marks Rule 1.4	Capitalize the first letter in a quotation unless it’s only a fragment of one.
Quotation Marks Rule 1.5	Place periods and commas <i>before</i> the closing quotation mark, not after.
Quotation Marks Rule 1.6	Place colons and semicolons <i>after the closing quotation mark, not before.</i> <i>Like the main character in the 1998 Coen Brothers’ film The Big Lebowski, “the dude abides”; in other words, I’ll be compliant.</i>
Quotation Marks Rule 1.7	Place question and exclamation marks <i>before</i> the closing quotation mark if they’re part of the quotation and <i>after</i> if they’re part of the sentence framing the quotation. <i>I thought you were kidding when you asked, “How can I help?”!</i>
Quotation Marks Rule 1.8	Quote exactly what’s between quotation marks; otherwise, use brackets to indicate changes made to words and ellipses for omissions. <i>Prime Minister Trudeau insisted that “Bilingualism [was] not an imposition on the citizens. . . . [It was] an imposition on the state” (Problems of Journalism, 1966).</i>
Quotation Marks Rule 1.9	Don’t use quotation marks around a paraphrase (a.k.a. indirect quotation). <i>Prime Minister Trudeau insisted that the people were forcing two official languages on the country rather than the other way around. (no quotation marks around the indirectly quoted speech)</i>
Quotation Marks Rule 2	Use quotation marks as “scare quotes” to draw attention to the way a word or phrase is used by others. <i>You can’t simply “phone this one in” because too many people will be depending on you doing this right.</i>
Quotation Marks Rule 3	Use single quotation marks only for reported speech within a quotation. <i>The interviewer then asked, “What did you mean when you said, in 1997, ‘The great thing about the hockey world is that there are a lot of people with loose lips?’” (Fitz-Gerald, 2015).</i>
Quotation Marks Rule 4	Use quotation marks around the title of a short work within a larger work such as an article in a magazine or journal, web page in a website, chapter in a book, song on an album, short film or TV episode in a series, etc. <i>The article “Bill Gates and Steve Jobs Raised Their Kids Tech-free—and It Should Have Been a Red Flag” (Weller, 2018) made me reflect on my own technology addiction.</i>

For more on quotations see the following resources:

- The Purdue OWL’s series of modules, starting with [How to Use Quotation Marks](#) (Purdue OWL, n.d.) and ending with the exercises in the fifth module
- [The Grammar Book’s Quotation Marks page](#) and its [Question Marks, Quotation Marks, and Parentheses Quiz 1](#) and [Question Marks, Quotation Marks, and Parentheses Quiz 2](#) linked at the bottom (Straus, 2007a)

5.3.8: Hyphens

Using hyphens between two or more words in combination helps the reader treat them as if they were one word when the words around them would create ambiguity without the hyphen(s). We do this especially with compound modifiers, which are two or more adjectives that modify the same noun in combination. For instance, if you said that there was funding available for small business owners, does that mean funding is only available for people who are under five feet tall? (In that case, “business owners” is read as a compound noun and “small” is the adjective modifying it.) If you mean that funding is available for business owners who employ fewer than 15 people, then you want to use the compound-modifier hyphen to pair up “small” and “business” so that they are read as if they were one adjective modifying the noun “owners”: *small-business owners*. Hyphens help the reader by guiding them toward what words to pair up when it could go either way.

The same is true of hyphens used in compound nouns. Saying, “It was a light year” means something completely different from “It was a light-year.” In the first case, you’re saying that nothing much happened that year; in the second, you’re saying that something spanned nearly 6 trillion miles. Hyphens matter!

- <http://www.btb.termiumplus.gc.ca/tcdnstyl-chap?lang=eng&letr=chapsect2&info0=2>

5.3.8.1: Compound-modifier Hyphens

The most common use of hyphens is for compound modifiers—that is, two or more adjectives that must be read in combination before a noun they describe. In fact, the hyphen you see between “compound” and “modifier” in the heading above exemplifies how this works: since both of those words together (and in that order only) modify the noun “hyphen” (“modify” meaning that they tell you what kind of hyphen it is), the hyphen helps the reader identify which words function as modifiers and which as nouns, since “modifier” in this case behaves as an adjective rather than a noun. Without the hyphen, the reader might make the mistake of taking “modifier hyphen” as a compound noun, as in the case of “small business owners” above.

If you were to say that the USSR was the first second world country to de-communize, the combination “first second” would surely trip up the reader. But pairing “second” and “world” with a hyphen resolves the ambiguity to say “The USSR was the first second-world country to de-communize.”

Table 5.3.8.1a: Common First-term Nouns in Compound Modifiers

Noun	Examples	Not Following a Noun
bottom- or top-	bottom-feeding fish top-shelf liquor top-tier player	Those fish are bottom feeding . All your liquor is top-shelf . The players we churn out are all top-tier .
high- or low-	high-caliber bullet low-cost solution high-fidelity sound low-life criminal high-quality products low-resolution screen	Most of the bullets found were high caliber . Let's find a solution that's low-cost . I want a sound that's more high fidelity . He is a total low-life . We ship products that are mostly high quality . Don't use pictures with low resolution .
self-	self-driven woman self-inflicted wound self-motivated boy self-taught pilot	She is very self-driven . We don't treat wounds that are self-inflicted . He is not self-motivated enough. I am totally self-taught .
well-	well-known solution well-thought-out plan well-trained army well-written letter	The solution is very well known . My plan is very well thought out . We're no match for an army so well trained . Only send the letter if it is well written .

Table 5.3.8.1b: Common Adverbs in Compound Modifiers

Noun	Examples	Not Following a Noun
fast- or slow-	Fast-moving process Slow-motion replay	The process is fast-moving after that. Let's review the goal in slow motion .
well-	well-chosen words well-known solution well-thought-out plan well-trained army well-written letter	Your words were all well-chosen . The solution is very well known . My plan is very well thought out . We're no match for an army so well trained . Only send the letter if it is well written .

Exception: Don't add hyphens after adverbs ending in *-ly*.

Table 5.3.8.1c: Common Prefixes Making Compound Modifiers

Prefix	Examples	Not Following a Noun
all-	all-inclusive resort all-powerful tech giant all-out offensive	Let's just go to an all-inclusive . Google's dominance has made it all-powerful . We sent everyone so our offensive was all-out .

Table 5.3.8.1d: Common Middle-term Prepositions in Three-part Compound Modifiers

Preposition	Examples	Without a Noun Following
-at-	Stay- at -home mom	You work and I'll just stay at home .
-by-	case- by -case basis six- by -six rule	We're just taking it case by case. Follow the rule called "six by six"
-for-	word- for -word translation	Don't copy word for word .
-of-	Cost- of -living index Out- of -province funding	The cost of living is always rising. The funding came from out of province .
-on-	one- on -one game	Let's play one on one .
-to-	Back- to -back classes business- to -business retailer coast- to -coast flight easy- to -follow presentation up- to -date calendar	My two classes today are back to back . Our sales are B2B (business to business). I'm flying coast to coast tonight. Your presentation was very easy to follow . My calendar is all up to date .

Table 5.3.8.1e: Common Three-part Compound-modifier Phrases

Examples	Without a Noun Following
Long-drawn-out affair	The affairs would all be long drawn out.
Off-the-charts happiness	I wish you happiness that is totally off the charts.
On-the-job training	All of the training will be done on the job.

Table 5.3.8.1f: Common Foreign-phrase Compound Modifiers

Examples	Without a Noun Following
Avant-garde filmmaker	His latest film is more avant garde.
Laissez-faire capitalism	Our approach is fairly laissez faire.

Don't hyphenate more recently imported foreign phrases that are still italicized.

Table 5.3.8.1g: Common End-term Nouns in Compound Modifiers

Noun	Examples	Without a Noun Following
-class	first- class cabin second- class citizen economy- class seating	I'm going first class . They treated me like I was second class . We bought economy class .
-degree	first- degree burns	I had burns in only the first degree .
-interest	Special- interest groups	All of those groups are special interest .
-ready	Game- ready athlete Job- ready graduate	All of our kids are game- ready . My training makes me fully job- ready .
-scale	Large- scale project	I've never done a project this large scale .
-time	full- time job half- time show part- time employment	She works full time . Let's talk about it at half time . We work part time on weekends.

Table 5.3.8.1h: Common Past-participles Following Nouns

Past Participle	Examples	Not Following the Noun
-based	evidence- based treatment faith- based reasoning	The treatment is evidence- based . The programming is all faith- based .
-bodied	Able- bodied teenager	You're able- bodied enough.
-capped	Snow- capped mountains	The mountains are nicely snow- capped .
-edged	double- edged sword	That sword is double edged .
-eyed	cross- eyed goofball	She went cross- eyed after a mule kick.
-faced	Two- faced charlatan	That guy is so two- faced .
-filled	garbage- filled bins	Those bins are all garbage filled .
-focused	solution- focused apology	The apology was solution focused .
-footed	Fleet- footed deliverer	The delivery man is fleet- footed .
-handed	Left- handed writer Right- handed stick Short- handed goal	We want a writer who is left handed . Pass me a stick that's right handed . The goal was short- handed .
-oriented	audience- oriented writing client- oriented response	The writing is more audience- oriented . Make it more client- oriented .
-sided	many- sided issue eight- sided dice	The issue is many sided . This die is eight- sided .
-willed	Strong- willed daughter	My daughter sure is strong-willed .

Table 5.3.8.1i: Common End-term Present-participle and Gerund Compound-modifier Adjectives

Present Participle	Examples	Not Following the Noun
-bearing	child- bearing hips load- bearing walls	These hips are child- bearing . Don't remove walls that are load bearing .
-ending	never- ending happiness	I hope your happiness is never ending .
-jerk	Tear- jerk ing performance	The performance was tear- jerk ing.
-making	decision- making process	I'm good at decision making .
-sharing	profit- sharing plan	Profit sharing is a strong incentive.
-solving	problem- solving skills	My best skill is problem solving .
-sounding	Odd- sounding name	Their names are all odd sounding .
-speaking	English- speaking world French- speaking politician	Those areas are English- speaking .
-talking	Smooth- talking sales rep	He was fairly smooth- talking .
-wrenching	Gut- wrenching scene	The scene was so gut- wrenching .

Table 5.3.8.1j: Common End-term Preposition Compound-modifier Adjectives

Preposition	Examples	Not Following the Noun
-after	sought- after jobs	These jobs are highly sought- after .
-by	drive- by shooting	Last night's shooting was a drive- by .
-down	Trickle- down economics	That wealth didn't quite trickle down .
-out	All- out war	The war went all-out after a year.
-up	made- up names built- up neighborhood	Those names sound so made up . The area is more built up now.

Table 5.3.8.1k: Common Number + Time-period Compound Modifiers

Duration	Examples	Not Following the Noun
-day	Five- day trial period	The trial period lasts five days .
-hour	Eleventh- hour bid	The bid came in the eleventh hour .
-minute	25- minute presentation	The presentation lasted 25 minutes .
-month	Ten- month term	The term ends after ten months .
-second	Nine- second sprint	He finished in under ten seconds .
-week	32- week co-op term	The co-op term is 32 weeks .
-year	Four- year degree program	An applied degree takes four years .

The second second-rate actor	The director wanted the second actor to be second rate.
The film's 15-week run shattered box-office records	The film shattered box-office records with its run of 15 weeks.
Two-way street	That street goes two ways.
After-tax income	Our income after taxes is laughable.
Duty-free goods	
First-come-first-served basis	
Garbage-filled streets	
Gut-wrenching scene	
Large-scale development	
Many-sided issue	
Mountain-climbing enthusiast	
Odd-sounding name	
One-trick pony	This pony has only one trick.
one-sentence paragraph	That paragraph only has one sentence.
Out-of-state funding	We went out of state for our funding.
Pay-as-you-go plan	We selected a plan that would have us pay as we go.
Quick-witted lady	
Short-handed goal	
Smooth-talking salesman	
Snow-capped mountains	
Soon-to-be graduate	
Strong-willed grandma	
Two-faced charlatan	
Tax-exempt services	
Tear-jerking performance	
Time-consuming activity	
Trickle-down economics	Claiming that wealth will trickle down is irresponsible.
User-friendly design	
Would-be writer	

But some have become one word, like handwritten, handmade, and standalone.

Compound Adjectival Numbers

Two-thirds majority	two thirds of the respondents
Two-year-old child	The child is two years old.
I've got ninety-nine problems, and grammar ain't one.	Pass the puck to number ninety-nine.

Suspended Hyphens

The 12- and 13-year-old kids	The kids are 12 and 13 years old.
The well-known and -loved song	The song became well known and loved.
How to treat first-, second-, and third-degree burns	The burns were first, second, and third degree.
Funding for medium- to large-scale businesses	
Scores in the six- to seven-point range	

Prefixes

- Big hair in the mid-1980s
- Populism results in new accusations of anti-Americanism (because “America” is capitalized).
- My ex-girlfriend and I haven't spoken in a decade.
- I re-wrote the essay.
- **Not with adverbs ending in *-ly***

Compound Nouns

Again, the use of a hyphen starting with “self-” (e.g., self-starter, self-esteem, self-care), starting with “great-” (e.g., great-grandmother, great-uncle), or ending with “-in-law” (e.g., mother-in-law, sister-in-law) and numbers above 20 (twenty-one, forty-three). If someone said that you have poor people skills, does that mean you have skill in dealing with poor people? By hyphenating “people-skills,” they make it clear that you could be better at dealing with people in general.

Table 5.3.8.2a: Common Compound Units of Measurement

Unit	Examples	Not Following a Noun
-hours	Kilowatt- hours Work- hours	I've racked up a few kilowatt-hours this winter. This project should take about 20 work-hours .
-miles	air- miles	Do you collect air-miles ?
-year	light- year	The next star is about _ light-years away.

Table 5.3.8.2b: Common Prefixes Making Compound Nouns

Prefix	Examples	Not Following a Noun
all-	all-inclusive resort all-powerful tech giant all-out offensive	Let's just go to an all-inclusive . Google's dominance has made it all-powerful . We sent everyone so our offensive was all-out .
ex-	ex-girlfriend ex-parrot ex-premier Harcourt	I haven't talked to my ex-girlfriend in ten years. That bird is dead. It is an ex-parrot . The ex-premier will be meeting with us today.
self-	self-control self-loathing	I'm exercising some self-control here. I follow up my dessert with a little self-loathing .

Table 5.3.8.2c: Common Three- or Four-term Compound Nouns

Compound Noun	Plural
forget-me- not	forget-me- nots
Jack-of-all-trades	Jacks-of-all-trades
mother-in-law father-in-law	mothers-in-law fathers-in-law
Ne'er-do- well	Ne'er-do- wells
Stick-in-the-mud	sticks-in-the-mud
Writer-in-residence	writers-in-residence

Box-office	box-offices
Fixer-upper	fixer-uppers
Great-grandfather	Great-grandfathers
Court-martial	courts-martial
Vice-president	vice-presidents
Tractor-trailer	tractor-trailers
Singer-songwriter	singer-songwriters
City-state	city-states
A has-been	has-beens
Sing-along	sing-alongs

Some words have become one word like headache, checkout, checkbook, uproar, downpour, input, sunrise, clearinghouse, bookkeeper, housekeeper, sightseeing, shipbuilding, cabinetmaker, blackboard, redhead, workplace, and even email (learn more about [How to Hyphenate a Compound Noun](#)).

Compound Verbs

Usually pairing a noun with a verb, but some are now combined into one word.

With Hyphens	One-word Compounds	Two Words (Verb + Preposition)
to air-condition		
to baby-sit		
to color-code		
to copy-edit	to downgrade	
to double-check	to ghostwrite	
to double-click	to handpick	
to dry-clean	to handwrite	
to Google-search	to multitask	to check out
to hand-wash	to proofread	to log in
to ice-skate	to shortchange	to step up
to proof-edit	to troubleshoot	
to reverse-engineer	to waterproof	
to second-guess	to whitewash	
to spot-check		
to test-drive		
to window-shop		

Source: [Grammar Usage – Compound Verbs](#) (Jamieson, 2010)

For more on hyphens, see the following resources:

- [The Punctuation Guide's Hyphens page](#) (Penn, 2011g)

- [The Grammar Book's Hyphens page](#) and its [Hyphens Quiz 1](#) and [Hyphens Quiz 2](#) at the bottom of the page (Straus, 2007b)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.9: Long Dashes

For more on long dashes, see the following resources:

- [The Punctuation Guide's Hyphen and Dashes](#) page (Penn, 2011h)
- [The Grammar Book's Dashes](#) page (Straus, 2018b)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.10: Question Marks

Question marks obviously follow questions. However, if the question is a polite request for action rather than one where a Yes or No answer is expected—i.e., a rhetorical question—end the sentence with a period rather than a question mark ([Jamieson, 2014](#)).

For more on question marks, see the following resources:

- [The Punctuation Guide's Question Mark](#) page (Penn, 2012)
- [The Grammar Book's Question Marks](#) page and its [Question Marks, Quotation Marks, and Parentheses Quiz 1](#) and [Question Marks, Quotation Marks, and Parentheses Quiz 2](#) linked at the bottom (Straus, 2014d)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.11: Exclamation Marks

For more on exclamation marks, which should be used sparingly, see the following resources:

- [The Punctuation Guide's Exclamation Point](#) page (Penn, 2011i)
- [The Grammar Book's Exclamation Points](#) page (Straus, 2015b)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

5.3.12: Periods

For more on periods, see the following resources:

- [The Punctuation Guide's Period page](#) (Penn, 2011h)
- [The Grammar Book's Periods page](#) (Straus, 2014e)

[Return to the Complete List of Punctuation Covered in This Chapter Section](#)

Key Takeaway



Near the end of the editing stage, proofread for punctuation errors, such as comma and apostrophe misplacement, that would confuse your reader and embarrass yourself.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the punctuation rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the punctuation errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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5.4: Proofreading for Spelling

Section 5.4 Learning Objectives

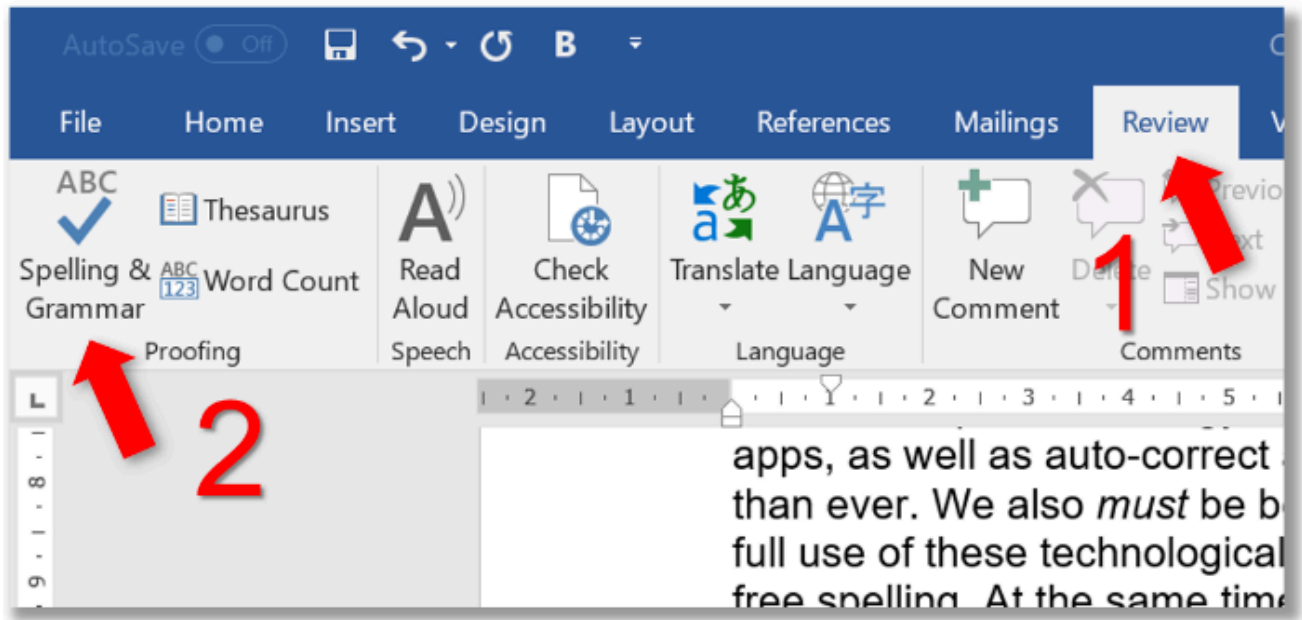


1. Identify and correct spelling errors in draft documents.
2. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

With the help of technology such as spellcheck features in Microsoft Word and online apps, as well as auto-correct and -complete on mobile devices, we can be better spellers than ever. We also *must* be better spellers than ever because, assuming we're making full use of these technological aides, audience expectations demand impeccable, error-free spelling. At the same time, the secondary school system has for decades relaxed its teaching of writing basics such that many students enter the post-secondary system lacking basic writing skills ([“University Students Can’t Spell,” 2010](#)). Between high school and the professional world, college students must not only quickly learn these basics, such as not confusing *its* and *it's*, but also develop the attitude that such details matter.

Using technology close at hand to improve your spelling is crucial to helping you get there. Follow the procedure in §5.1.4.8 above (and shown in Figure 5.1.4.8; click on the thumbnail above-right to return to it) to set up your spellchecker in Microsoft Word so that it identifies errors as you go. Though it's a good idea to draft quickly and leave the pace-killing attention to detail for the editing stage, you can look up spellings for words that you struggle with as you go by just highlighting them, going to the Review tool ribbon, and clicking on the Spelling & Grammar tool at the far left (or Alt + R, S). The feature will activate to suggest the correct spelling of just that word. Always also run a spellcheck sweep of your entire document by scrolling up to the top of your document and, without anything highlighted, following the same procedure to activate the

spellchecker to examine each error and the tool's suggested corrections before you finalize your document for submission.



What about spellchecking when writing outside of your word processor, such as in an email? For this you must ensure that your internet browser spellchecker is on and properly set up. In Google Chrome, for instance, you would just:

1. Click on the Settings icon (three stacked periods at the top right).
2. Click on the **Settings** option from the drop-down menu.
3. Scroll down and click on **Advanced Settings**.
4. Scroll down to the **Languages** section and click on the **Spell check** to expand the control panel.
5. Click on **English (Canada)** to toggle on the feature so it turns blue. You will see there that you can also add custom words.

With the spellchecker turned on, your browser will identify misspelled words by red-underlining them. If you have any additional difficulties, you can also move text to your word processor, use its more advanced spellchecker and editing features, then copy and paste your draft back into the email.

As good as the spellcheckers can be if you set them up properly, you must also know what to look for on your own so that you know what to approve when the spellchecker suggests edits. We'll divide this self-editing skill into two of the biggest challenges to spellcheckers:

- [5.4.1: Spelling Names](#)
- [5.4.2: Spelling Homophones](#)

5.4.1: Spelling Names

How do you feel when someone misspells your name? If you're like most people, you feel a little insulted, especially if the offending person had easy access to the correct spelling. Spelling people's names correctly is not only an essential principle of netiquette but also key to maintaining your credibility in correspondence. If you're addressing a hiring manager in the cover letter to a job application, for instance, and her first name happens to be one of the 155 unique spelling variants of the name Caitlin ([Burch, 2001](#)), your livelihood depends on spelling her name just as she does herself. Otherwise, your lack of attention to detail becomes an invitation for her to deposit your application directly in the shredder.

Be especially vigilant with names during the proofreading stage of the writing process and use technology to help. With naming trends in the last couple of decades tending toward unique spellings both for people and products, spellcheckers may be of little help at first. Your best bet is to carefully confirm the name of the person in question by finding multiple sources that confirm their name (e.g., documents at hand, as well as their [LinkedIn](#) profile online), or the name of the product by consulting the company website, and add it to your spellchecker. When your spellchecker is doing an active sweep and grapples with the unfamiliar name, click on the "Add to Dictionary" option. That way, you can teach your spellchecker to be vigilant for you.

5.4.2: Spelling Homophones

Many spelling errors involve **homophones**, words that sound the same in speech but are spelled and used differently in writing. When you mean *there* but write *their* or *they're* in your draft, a sophisticated grammar and spellchecker will mark it as an error because it's incorrect in the context of the words around it despite being spelled correctly on its own. Just in case your checker is fooled by it, however, familiarizing yourself with the most common homophone-driven spelling errors is wise. Ensure at the proofreading stage that your writing hasn't fallen into any of these traps.

Table 5.4.2: Common Homophone Misspellings

Misspelling	Correct Spelling	When You Mean to Say
ad	add	to put together
add	ad	advertisement
advice	advise	to guide (verb)
advise	advice	guidance (noun)
air	heir	successor
already	all ready	everyone is ready
all ready	already	previous
altar	alter	change
alter	altar	church object
ant	aunt	mother's sister
are	our	belongs to us
aunt	ant	insect
bare	bear	animal
bear	bare	naked
beat	beet	vegetable
beet	beat	assault
been	bin	box
bin	been	past participle of <i>to be</i>
cite	sight / site	vision / place
complement	compliment	flatter
compliment	complement	matches or pairs well
could of	could have	maybe
council	counsel	advise
counsel	council	decision-making group
cue	queue	lineup
dear	deer	animal
deer	dear	greetings
defiantly	definitely	for sure
desert	dessert	after-dinner treat
dessert	desert	leave

ensure	insure	take out insurance
fair	fare	cost of transportation
fare	fair	honest / light / carnival
hear	here	this place
heir	air	oxygen
here	hear	listen
hole	whole	entire
holy	wholly	entirely
hour	our	belongs to us
insure	ensure	make sure
its	it's	it is
it's	its	belonging to it
knew	new	just arrived
lead	led	guided
led	lead	in front / heavy metal
mail	male	man
male	mail	letter sent by post
manner	manor	mansion
manor	manner	way
missed	mist	fog
mist	missed	didn't get it
new	knew	knowledge of
our	hour / are	60 minutes / form of <i>to be</i>
pair	pare / pear	peel / fruit
pare	pair / pear	couple / fruit
peace	piece	part
pear	pair / pare	couple / peel
piece	peace	calm
plane	plain	simple
plain	plane	flat surface, airplane
principal	principle	rule, concept

principle	principal	main, one in authority
queue	cue	prompt
sail	sale	being sold
sale	sail	wind-catching boat sheet
seam	seem	appear to be
seem	seam	joining line in a garment
should of	should have	ought to
sight	cite / site	credit a source / place
site	cite / sight	credit a source / vision
steal	steel	metal
steel	steal	rob
storey	story	tale
story	storey	floor of a building
tail	tale	story
tale	tail	animal appendage
their	there / they're	that place / they are
there	their / they're	belongs to them / they are
they're	their / there	belongs to them / that place
through	threw	tossed
threw	through	passed
to	too / two	also / 2
toe	tow	drag
too	to / two	toward / 2
tow (the line)	toe (the line)	foot digit (conform)
two	to / too	toward / also
ware	wear / where	put on clothes / what place
weather	whether	if
weak	week	7 days
wear	ware / where	pottery / what place
week	weak	not strong
whether	weather	climate

where	wear / ware	put on clothes / pottery
whole	hole	opening
wholly	holy	sacred
whose	who's	who is
who's	whose	belongs to who
would of	would have	didn't get to do
your	you're	you are
you're	your	belongs to you

For more on this topic, see [Homophones](#) (Singularis, 2013).

Key Takeaway



Near the end of the editing stage, proofread for spelling errors with a combination of a spellchecker and your own editorial vigilance, looking especially for problems with homophones as well as people's and products' names.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the punctuation rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the punctuation errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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5.5: Proofreading for Mechanics

Section 5.5 Learning Objectives



1. Identify and correct spelling errors in draft documents.
2. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.

The very last target for proofreading as you finalize your draft for submission is mechanics. In English writing, **mechanics** relates to typographic style such as the choice between UPPERCASE and lowercase letters, *italics* or **boldface** type and plain style, as well as using figures (e.g., 1, 2, 3) or written out numbers (e.g., *one*, *two*, *three*). Professionals follow stylistic conventions for mechanics much like they do punctuation rules. If you don’t know these conventions, making them up as you go along may produce unprofessional-looking documents. Consider the following as your guide for how to get your writing mechanics right.

- [5.5.1: Capitalizing](#)
- [5.5.2: Italicizing, Underlining, and Bolding](#)
- [5.5.3: Numbering](#)

5.5.1: Capitalizing

One of the worst mistakes you can make in a high-priority document like a cover letter is a glaring capitalization error such as not capitalizing the first letter in a sentence or writing “im” or “ive” instead of “I am” or “I have.” These errors are fine when texting your friends. To a hiring manager, however, the red flags they raise concerning the literacy, work ethic, and even maturity of the applicant might land that application in the shredder. At the other typographic extreme, those who use all-caps for anything other than abbreviations, as in “SEND ME THAT REPORT RIGHT NOW,” look emotionally unstable. In normal writing, we use conventional combinations of capitals and lowercase letters meaningfully to guide our readers through our sentences. Let’s take a closer look at when to capitalize and when not to capitalize letters.

- [5.5.1.1: What to Capitalize](#)
- [5.5.1.2: What Not to Capitalize](#)
- [5.5.1.3: Abbreviations](#)

5.5.1.1: What to Capitalize

You can’t go wrong if you capitalize in the following situations:

- First letter of the first word of a:
 - Sentence; e.g., *These pretzels are making me thirsty.*
 - Full-sentence quotation even if it appears after a signal phrase; e.g., *A great American humorist put it best when he said, “Travel is fatal to prejudice, bigotry, and narrow-mindedness” (Twain, 1869, p. 333).*
 - Rule following a colon in a sentence; e.g., *My mother taught me the golden rule: Treat others the way you’d like to be treated yourself.*
 - **P**oint in a bullet-point or numbered list regardless of whether it’s a full sentence or just a noun phrase, as in this list
- The first-person personal pronoun “**I**”
- Major words in **titles**, including the first letter of the first word no matter what it is, nouns, pronouns, verbs, adjectives, and adverbs, but not short prepositions such as *in*, *of*, *on*, or *to*, nor coordinating conjunctions such as *and*, *but*, *for*, or *so*, unless they’re the first word (see Table 5.5.2.1 below for several example titles)
- The first letter of proper nouns, which include the types given below in Table 5.5.1

Table 5.5.1.1: Proper Nouns

Proper Noun Type	Examples
People and professional roles or familial relations preceding the name	Prime Minister Justin Trudeau, Roberta Bondar, Professor Patrick Grant, Mayor Humdinger, Ludwig van Beethoven, Aunt Pam, God, Buddha
Adjectives derived from names	Shakespearean sonnet, Freudian slip
Major buildings and infrastructure	CN Tower, the Queensway, the Hoover Dam
Specific geographical locations and regions	Ottawa, British Columbia, the Canadian Rockies, Lake Ontario, the West Coast, Eastern Canada, the Maritimes, South Asia, the Netherlands
Celestial bodies	Venus, Earth, Mars, the Sun, the Kuiper Belt, the Milky Way, the Virgo Supercluster
Books, films, etc. (see Table 5.5.2.1 below)	<i>Beautiful Losers</i> , <i>Star Wars</i> , <i>The Onion</i> , <i>Overwatch</i> , the <i>Ottawa Citizen</i>
Days of the week, months, holidays	Monday, November, Labor Day, Groundhog Day, Ramadan, Hanukkah, Fall 2019 semester
Historical events and periods	the Battle of Vimy Ridge, the Cold War, the Renaissance, the Old Kingdom, Anthropocene, the Big Bang
Ethnicities, nationalities, religions, and languages	Anishinaabe, Australian, English, Russian, Malaysian, Catholic, Islam, Sunni Muslim, Swedish, Swahili
Institutions, political and cultural groups	Algonquin College, University of Toronto, the Supreme Court, New Democrats, Montreal Canadiens, Oscar Peterson Trio
Academic courses, programs, departments, and some degrees	Statistics 101, Communications I, Game Development Advanced Diploma Program, School of Business, PhD, MBA
Numbered or lettered items	Flight AC2403, Gate 11, Invoice No. 3492B, Serial No. D8834-2946-1212, Rural Road 34, Figure 8, Volume 2, Part 4, Model 3
Brand names, corporations, and stores	Microsoft Word, Samsung Galaxy, Tesla, Apple, Google, GlaxoSmithKline, Mountain Equipment Co-op

5.5.1.2: What Not to Capitalize

Don't capitalize the following:

- Directions if they're not in a geographical name; e.g., *We drove **east** to North Bay, Ontario, from the Pacific Northwest.*
- Professional roles on their own without a name following (e.g., *the prime minister*) or if they follow the person's name; e.g., *Patrick Grant, professor of English*
- Celestial bodies when used outside of the context of celestial bodies; e.g., *He's really down to earth. I love you to the moon and back. Here comes the sun.*
- The seasons, despite the fact that the days of the week and months are capitalized (e.g., *We're heading*

south for the winter.) unless they're part of a title (e.g., *Fall 2019 semester*)

- Century numbers; e.g., *the nineteenth century*
- Words that came from names or geographical regions; e.g., *pasteurize, french fries, italics, roman numerals, arabic numerals*
- Fields of study; e.g., *history, biology, physics, economics, dentistry*
- Some academic degrees; e.g., *master's degree, bachelor's degree*
- Citations at the page and line level: *page 6, lines 23–27; p. 24, ll. 12–14*

What to Look for When Proofreading

Pay close attention to the beginning of sentences, each point in a list, titles, and proper nouns. Determine whether you should capitalize or leave letters lowercase depending on the conventions given above.

Incorrect: *Let's go South to visit the President and stay with vice president Frito.*

The fix: *Let's go south to visit the president and stay with Vice President Frito.*

The fix: *Let's go south to visit President Comacho and stay with Frito, his vice president.*

In the drafting process, you might delete the original capitalized opening to a sentence while trying out another style of sentence and forget to capitalize the new beginning. The proofreading stage is when you can catch glaring errors such as this. Also, the convention for geography is to capitalize directions only if they're part of place names but not when they're mere compass directions. Finally, capitalize professional titles only when they precede a name.

Incorrect: *In addition, im proficient in the use of Microsoft office, such as Powerpoint.*

The fix: *In addition, I am proficient in the use of Microsoft Office, such as PowerPoint.*

Texting habits might die hard. A crucial step in professionalizing yourself, however, is to correct informal spellings such as *im* so that they are the more correct *I'm* or more formal *I am*, especially in job application documents. Also, be especially careful with capitalization around proprietary names such as software, which may include internal capitalization as we see in *PowerPoint* or *YouTube*.

Incorrect: I had to read the textbook *Communication At Work* for my Algonquin college communications course in the accounting program.

The fix: I had to read the textbook *Communication at Work* for my Algonquin College Communications course in the Accounting program.

The titling convention is to capitalize major words but not short prepositions such as *at*. Since academic courses, institutions, and programs are proper nouns like the names of people, capitalize them all.

5.5.1.3: Abbreviations

Fully spell out abbreviations the first time you mention them and put the abbreviation in parentheses. For example, if you were to say, "The Public Health Agency of Canada (PHAC) is reporting an above-average number of flu deaths this year," subsequent mentions of the agency can appear as simply "PHAC."

Institutions that are so common as names (proper nouns) in their abbreviated form (e.g., CBC, which stands for the “Canadian Broadcasting Corporation”) can be given as abbreviations unless introduced to an audience that wouldn’t know them. As you can see here, avoid adding periods after each uppercase letter in an abbreviation.

For more on capitalization, see [The Grammar Book’s Capitalization Rules page](#) (Straus, 2014).

5.5.2: Italicizing, Underlining, and Bolding

The standard typeface options of *italics*, **bold**, and underline allow writers to draw attention to their text in varying degrees. Each has its advantages and disadvantages. The biggest disadvantage comes from overuse, which diminishes their impact. Taking advantage of their ability to draw the reader’s eye and communicate information beyond the words they express requires following certain conventional uses for each. We’ll start with the most meaningful in terms of the information it can convey.

As the typeface option that slants the top of each letter to the right, **italic typeface** performs several possible functions related to emphasizing words. Italics can also resolve ambiguities that would cause confusion without it. Use italics for the following purposes:

- **Emphasis:** Use italics sparingly to emphasize particular words or phrases; e.g., “I’ve asked them no less than *three times* to send the reimbursement check.” If we were saying this aloud, you would raise your volume and slow down your enunciation to emphasize “*three times*.” Italicizing is more mature and professionally appropriate than using all-caps to emphasize words.
- **Words under Discussion:** Italicize a word, phrase, or even a full sentence when discussing it. For instance, you see throughout this textbook example words italicized, such as just above in §5.5.1.1.
- **Foreign Words and Phrases:** Italicize foreign words that have not yet become part of the English vernacular. For instance, italicize the binomial Latin name of a species (e.g., *branta canadensis* for Canada goose) or the French phrase *déjà vu* but not the more familiar borrowed French words “bourgeois,” “brunette,” “chauffeur,” “cliché,” “depot,” “entrepreneur,” “résumé,” or “souvenir.” If the foreign word is in most English dictionaries, it is probably safe to write it in plain style rather than italics.
- **Titles:** Use italics when referring to the title of a longer work such as a book, film, or newspaper. See Table 5.5.2.1 below for a full list of the types of works you would italicize as opposed to shorter works (or titled sections within longer works) you would put in quotation marks without italics.

Table 5.5.2.1: Italicized Titles

Type of Work	Examples
Book, legislation	<i>Elements of Style, A Brief History of Time, The Handmaid's Tale, The Great Gatsby, The Copyright Act</i>
Magazine	<i>Macleans, The Walrus, Chatelaine, MoneySense, Canadian Business, The Hockey News, Today's Parent, Flare</i>
Newspaper	<i>The Globe and Mail, the Toronto Star, National Post, Montreal Gazette, Ottawa Citizen, Time Colonist</i>
Website (APA)	<i>YouTube, Wikipedia, Facebook, Instagram, The Onion</i>
Film	<i>Casablanca, Thirty Two Short Films About Glenn Gould</i>
TV show	<i>Dragons' Den, Hockey Night in Canada, Orphan Black</i>
Play, long poem	<i>The Rez Sisters, Romeo & Juliet, Waiting for Godot, Paradise Lost</i>
Album, opera	<i>Drake's Views, Arcade Fire's Funeral, Alanis Morissette's Jagged Little Pill, Mozart's The Magic Flute</i>
Works of art	<i>Mona Lisa, The School of Athens, The Starry Night, Voice of Fire</i>
Video game	<i>Tetris, Grand Theft Auto V, Super Mario Bros., Minecraft</i>
Ships, airplanes	<i>the Titanic, Bismarck, Hindenburg, Enola Gay</i>
Legal cases	<i>Roe v. Wade, Brown v. Board of Education, Baker v. Canada</i>

When words are already italicized, such as a sentence under discussion or a book title within a book title, then de-italicize the title back into plain style (e.g., *Vision in Shakespeare's King Lear*). Exceptions to the rule of italicizing books are holy texts such as the Bible and Koran, though specific editions should be italicized (e.g., *The New American Standard Bible*).

Underlining is normally an old-fashioned alternative to italicizing because it identified titles written on typewriters before modern word processors made italicization feasible. Today, underlining is mainly used to emphasize words within italicized titles or as an alternative to boldface type.

More than any other typeface, **bold** is best at emphasizing words because it draws the reader's eyes more effectively than italics or underlining, especially for document titles and section headings. In casual emails, you can also use it to highlight a main action point that's surrounded by plain-style text to ensure that the reader doesn't miss it. Avoid bolding, underlining, italicizing, and using all-caps in combination merely to lend added emphasis to words. Use whichever one is most appropriate in context.

For more on italics, underlining, and bolding, see the following resources:

- Your Dictionary's [When to Italicize](#) (2009)
- WikiHow's [How to Use Italics](#) (Morgan, 2015)
- Butterick's Practical Typography's [Bold or Italic](#) (Butterick, 2013)

5.5.3: Numbering

When do you spell out a number (e.g., *ten*) and when do you use a figure (e.g., *10*)? What are the conventions for academic and professional situations? It depends on your purposes, but in routine formal situations and in APA style, spell out numbers from one to ten and use figures for 11 and up. In MLA, spell out any number if it's only a word or two, but use figures for numbers that require three or more words ([Becker, 2014](#)). In informal and technical writing, however, using only figures ensures accuracy, consistency, and brevity. Let's look at the formal APA conventions in more detail in Table 5.4.3.

Table 5.5.3: Formal Numbering Conventions

Convention	Examples
Words	only one person, ten reasons
Figures	11 people, 40 cars, 127 hours, 330 lbs. \$39.99 , 6.12 liters, 68,000 voters, 186,282.397 miles per second.
Large round	a hundred people, a thousand times, six billion dollars, \$6 billion , \$6,300,000 , \$6.3 million , \$2.345 trillion , You have a hundred trillion microbes in your body.
Fractions	over two thirds of respondents, 4 millionths of a second, a one-fifth share of the profit, $3/32$ allen key, 1 and $21/64$ inches
Percentages and decimals	8 percent increase (<i>in formal docs</i>), 8% increase (<i>in business forms and technical docs</i>), 9.57 seconds, .045 cm, 0.12 g
Beginning of sentences	Twenty-six percent of respondents agreed while 71% disagreed.
Days, years	July 1, 1867 ; from the 1st of July to the 4th ; AD 1492 ; from 2000 to 2018 ; in the 2010–2011 season; the nineties , 1990s , '90s
Times	8 a.m., noon, 1:15 p.m., 5-6 p.m., 10:30–11 a.m., 11:30 a.m.– 1 p.m. (or ...PM)
Addresses	One First Street, 2 Second Street, 16 Tenth Avenue, 251 11th Avenue W, 623 East 125th Street
Telephone	613-555-4450 ext. 9832, 250.555.7204, (416) 555-1185
Identification	Room 6 , Channel 4 , Hwy. 416 , Elizabeth II , Henry V Andre weighed over 200 lbs. by age 12 and over 500 lbs. by 40.
Weights and measures	The room is 10' by 12' in a 2,400 sq. ft. house., 8 meters (<i>in formal docs</i>), 24 km (<i>in informal and technical docs</i>) Little Nicky was 3 years and 7 months when his family moved.
Ages	By the time she was thirty-six , Miranda had accomplished plenty. Miranda, 36 , has accomplished plenty.
Pages	page 24 / (p. 24), pages 67–68 / (pp. 67–68), (pp. 114–118), chapter 11 / (ch. 11), chapters 11-12 (chs. 11-12)
Commercial and legal	The stated amount of \$1,200 will be paid no less than two (2) weeks after the completion of the contact work.
Related (all under 10)	We bought six shirts, eight pairs of pants, and four jackets.
Related (any 10+)	We bought 9 apples, 18 bananas, and 6 pineapples.
Consecutive	They ordered twelve 90-lb. weights. We observed twenty-five 500-megaton explosions. I manufactured 14,032 6709T parts for Dynamo, Inc. (<i>When two numbers appear consecutively, generally write out the number for the first and use a figure for the second, but use a figure for the first if it would take more than one or two words to write it out.</i>)

What to Look for When Proofreading

Determine whether you should replace your spelled-out numbers with figures or vice versa according to the conventions given above.

Incorrect: *Only 2 people showed up.*

The fix: *Only **two** people showed up.*

In formal writing, spell out one- or two-word numbers rather than use figures lazily. However, feel free to use figures, no matter how small the number, in informal writing where concision matters most.

Incorrect: *She was charged **nine-hundred-and-thirty-six dollars and ninety-eight cents** for the repair.*

The fix: *She was charged **\$936.98** for the repair.*

Incorrect: *The chances of life existing on other planets are quite high if there are, by extrapolation, roughly **19,000,000,000,000,000,000,000,000** star systems with earth-like planets in the universe ([Frost, 2017](#)).*

The fix: *The chances of life existing on other planets are quite high if there are, by extrapolation, roughly **19 billion trillion** star systems with earth-like planets in the universe ([Frost, 2017](#)).*

Incorrect: ***23,000** units were sold in the first quarter.*

Incorrect: ***Twenty-three thousand** units were sold in the first quarter.*

The fix: *In the first quarter, **23,000** units were sold.*

Though you should use a figure to represent a number above ten and spell out a number appearing at the beginning of a sentence, re-word the sentence if that number is more than two words.

Incorrect: *We've moved the meeting **to 05/04/18**.*

The fix: *We've moved the meeting **from Tuesday, April 2, to Friday, April 5, 2018**.*

The fix: *We've moved the meeting **from Tuesday the 2nd of April to Friday the 5th, 2018**.*

Though the above correction sacrifices brevity, the gains in clarity can potentially prevent expensive miscommunication. The correction prevents the message recipients from misinterpreting the new meeting date as being May 4th and helps them pinpoint which date in their calendars to click and drag the original meeting from. Providing the days of the week also helps the recipients determine at a glance whether the new date conflicts with regularly scheduled weekly appointments.

Incorrect: *Let's meet at **number ninety, 6th Avenue, at fourteen o'clock**.*

The fix: *Let's meet at **90 Sixth Avenue at 2 p.m.***

Though “ninety” would be correct in some contexts (MLA style) because it is a one-word number, APA address conventions require you to use figures for address numbers and to spell out numerical street/avenue numbers from first to tenth, then to use figures from 11th onward. Also, the English convention for representing time of day is to use the twelve-hour clock, whereas the French convention is to use the twenty-four-hour clock.

Incorrect: *Will you still need me, will you still feed me when I'm **64**?*

The fix: *Will you still need me, will you still feed me when I'm **sixty-four**?*

Unless the age follows a person's name as an appositive (e.g., *Paul, 64, is losing his hair*) or is part of a series

that identifies several ages (e.g., *a program for those of 4 to 6 years of age, with some 7-year-olds*) or combines one person's age in years and months, spell out ages up to one hundred.

Incorrect: *The one expedition cataloged **thirty-four** new types of spiders, 662 new types of beetles, and 178 new types of ants.*

The fix: *The one expedition cataloged **34** new types of spiders, 662 new types of beetles, and 178 new types of ants.*

Though normally you would spell out two-word numbers, maintaining consistency with the related numbers in the series, which are figures here because they are over ten, takes precedence.

Incorrect: *The program has **2** streams, one for the **4**-year-olds and another for the **5**-year-olds.*

The fix: *The program has **two** streams, one for the **4**-year-olds and another for the **5**-year-olds.*

This looks at first as if all three of these are related numbers in a series and therefore must all be figures. The related-numbers convention applies to only the last two numbers (ages), however, whereas the first number is not an age, hence not part of the series. Since the first number can be spelled out as one word, *two*, it is not given as a figure.

Incorrect: *If your gym orders more than **20 100-lb.** weights, you'll get every additional unit for half price.*

The fix: *If your gym orders more than **twenty 100-lb.** weights, you'll get every additional unit for half price.*

To avoid “20 100-lb.” being misread as “20100-lb.,” bend the rule about using figures for numbers above ten to spell out the first of the consecutive numbers and use a figure for the second since it's a weight. (If the first number were more than two words spelled out and the weight only one, however, “150 thirty-pound weights” would be preferable.)

For more on numbers, see APA Style's [Comparing MLA and APA: Numbers](#) (Becker, 2014).

Key Takeaway



At the end of the editing stage, proofread for mechanical errors involving capitalization, typographic style (e.g., italics), and numbers.

Exercises



1. Go through the above sections and follow the links to self-check exercises at the end of each section to confirm your mastery of the punctuation rules.
2. Take any writing assignment you've previously submitted for another course, ideally one that you did some time ago, perhaps even in high school. Scan for the mechanical errors covered in this section now that you know what to look for. How often do such errors appear? Correct them following the suggestions given above.

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CHAPTER 6: ROUTINE MESSAGES

Veronika Humphries

Chapter Learning Objectives

1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Write routine message types such as information shares, requests, and replies; complaints and claims; and recommendation and goodwill messages.
3. Organize and write persuasive messages.
4. Organize and write negative messages.

The vast majority of business messages sent daily are routine so-called positive messages sharing information, requesting action, or thanking someone for something. Most of these messages are positive or neutral in content, even if they may involve minor complaints or claims where the sender requests an error correction. All these messages are **direct-approach messages**. The main idea or request is listed at the beginning of the message with more details and explanations described later in the message. In situations when you must describe a delicate situation or something involving negative news, you should follow an **indirect approach**.

- [6.1: Positive Messages: Information, Requests, and Replies](#)
- [6.2: Complaints and Claims](#)
- [6.3: Negative Messages](#)

6.1: Positive Messages: Information, Requests, and Replies

Section 6.1 Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Write routine message types such as information shares, requests, and replies.

Most business professionals would agree that most messages they compose at work concern requests for information or action and reply to such requests by providing answers and acknowledgments. Although you have likely written many such messages already, you may need help to polish the professional style, vocabulary, and organization of your messages to meet a professional business standard and to achieve your goal successfully. It is important to ask or request something concisely but clearly, providing correct and enough information so that the person requesting the information will not have to ask clarifying questions. A few scenarios with examples are described below.

[Positive Messages: Information, Requests, and Replies Topics](#)

- [6.1.1: Providing Information](#)
- [6.1.2: Requests for Information or Action](#)
- [6.1.2.1: Instructional Messages](#)
- [6.1.3: Replies to Requests](#)

6.1.1: Providing Information

Perhaps the simplest and most common routine message type is where the sender offers information that helps the receiver. These may not be official memos, but they follow the same structure, as shown in Table 6.1.1 below.

Table 6.1.1: Outline for Information Shares

Outline	Content	Example Message
1. Opening	Main point of information	Hi Karin, I just saw a CFP for a new funding opportunity you can apply for via the Department of Agriculture.
2. Body	Information context and further details	Find it on the Greenbelt Fund's Local Food Literacy Grant Stream page. If you haven't already been doing this, you should also check out the Ministry's general page on Funding Programs and Support to connect with any other grants, etc. relevant to the good work you do.
3. Closing	Action regarding the information	It looks like the deadline for proposals is at the end of the week, though, so you might want to get on it right away. Good luck! Shradha

The writer made the reader's job especially easy by providing links to the recommended web pages using the hyperlinking feature (Ctrl + K) in their email. Replies to such information shares involve either a quick and concise thank-you message (see §6.1.3 below) or continuing the conversation if it is part of an ongoing project or initiative. You should change the email subject line as the topic evolves (see §6.1.2 below). Information shared with a large group, such as a departmental memo to 60 employees, doesn't usually require acknowledgment. If everyone wrote the sender just to say thanks, the barrage of reply notifications would frustrate them. They try to carry on their work while sorting out replies with valuable information from mere acknowledgments. Only respond if you have helpful information to share with all the recipients or just the sender.

[Return to the Positive Messages: Information, Requests, and Replies Topics menu](#)

6.1.2: Requests for Information or Action

Managers, clients, and coworkers alike send and receive requests for information and action all day. Because these provide the recipient with direction on what to do, the information that comes back or activity that results from such requests can only be as good as the instructions given. Therefore, such messages must be well organized and clear about expectations, opening directly with a clearly stated general request. On the other hand, if you anticipate resistance to the request, you should compose and organize your message in the indirect approach—and then proceed with background and more detailed instruction if necessary (as we see in Table 6.1.2 below).

Table 6.1.2: Outline for Direct Information or Action Requests

Outline	Content	Example Message
Subject Line	3- to 7-word title	Website update needed by Monday
1. Opening	Main question or action request	Hello, Mohamed: Could you please update the website by adding the new hires to the Personnel page?
2. Body	Information or action request context, plus further details	We've hired three new associates in the past few weeks. With the contents of the attached folder that contains their bios and hi-res pics, please do the following: <ol style="list-style-type: none"> 1. Proof the bios using Track Changes and send them to me. 2. Post the proofed bios on the site right away and call me as soon as they're up. I'm sure your edits will be fine, but I'd like to just quickly read them and suggest further edits over the phone if need be since time is of the essence here. 3. Downsize the pics to 72dpi and crop them so they're the same dimensions as the other portraits on that page before posting them along with the bios.
3. Closing	Deadlines and/or submission details	Sorry for the short notice, but could we have this update all wrapped up by Monday? We're meeting with some investors early next week and we'd like the site to be fully up to date by then. Much appreciated! Sylvia

Note that the opening question doesn't always require a question mark because you are expecting action as a result of the request rather than a Yes or No answer. Never forget, however, the importance of saying "please" when asking someone to do something (see §6.1.2 above for more on courteous language). Notice that using a list of requests in the message body helps break up dense detail so that request messages are more reader-friendly (see §6.1.2 above). All the efforts that the writer of the above message made to deliver a reader-friendly message will pay off when the recipient performs the requested procedure exactly according to these worded expectations.

6.1.2.1: Instructional Messages

Effective organization and style are critical in requests for action that contain detailed instructions. Whether you're explaining how to operate equipment, apply for funding, renew a membership, or submit a payment, the recipient's success depends on the quality of the instruction. Vagueness and a lack of detail can result in confusion, mistakes, and requests for clarification. Too much detail can result in frustration, skimming, and possibly missing critical information. Profiling the audience and gauging their level of knowledge is vital (see

Chapter 2 above on analyzing your audience) to provide the appropriate detail level for the desired results. Look at any assembly manual, and you'll see that the quality of its readability depends on the instructions being organized in a numbered list of parallel imperative sentences. Though helpful, the above message would be much improved if it included illustrative screenshots at each step. Making a short video of the procedure, posting it to YouTube, and adding the link to the message would be even more effective.

Combining DOs and DON'Ts is an effective way to help your audience complete the instructed task without making common mistakes. Always begin with the DOs after explaining the benefits or rewards of following a procedure, not with threats and heavy-handed *Thou shalt not*s. Most people are better motivated by chasing the carrot than fleeing the stick. If necessary, you can certainly follow up with helpful DON'Ts and consequences, but phrased in courteous language, such as “For your safety, please avoid operating the machinery when not 100% alert or you may risk serious harm.”

[Return to the Information Shares, Action Requests, and Replies Topics menu](#)

6.1.3: Replies to Requests

When responding to information or action requests, simply deliver the needed information or confirm that the action has been completed unless you have good reasons for refusing. Stylistically, such responses should follow the 6 Cs of effective business style, especially courtesies such as prioritizing the “you” view and audience benefits and saying “please” for follow-up action requests. Such messages also provide opportunities to promote your company's products and services. However, ensure the accuracy of all details because if disputes arise, courts will consider them legally binding, even if this information was only described in an email. Therefore, manager approval may be necessary before sending, especially if you are not authorized to initiate or approve bids or negotiate contracts. Organizationally, a positive response to an information request delivers the main answer in the opening, proceeds to give more detail in the body if necessary, and ends politely with appreciation and goodwill statements, as shown in Table 6.1.3 below.

Table 6.1.3: Outline for Positive Replies to Information or Action Requests

Outline	Content	Example Message
Subject Line	3- to 7-word title	Re: Accommodation and conference rooms for 250 guests
1. Opening	Main information or action confirmation	<p>Greetings, Mr. Prendergast:</p> <p>Thank you so much for choosing the JW Marriott New Orleans for your spring 2023 sales conference. We would be thrilled to accommodate 250 guests and set aside four conference rooms next May 25 through 29.</p> <p>In answer to your other questions:</p> <ul style="list-style-type: none"> • Yes, all 250 of your guests can dine together in our Ile de France Grand Ballroom in a variety of table configurations to suit your needs. • Certainly, you can choose from among six conference rooms with 100-seat capacities, as well as a variety of other smaller rooms. Each has a large screen with a podium equipped with an audio-visual presentation console; presenters can either plug their USBs into the Windows-based console computer or connect their laptops with the HDMI cable. • Every guest suite has Wi-Fi, and each of our hotel's 30 floors has a business lounge equipped with 10 computer workstations (5 PCs and 5 Macs), multifunctional phone/faxes, and printer/copiers. • Yes, we have a fleet of five shuttles that can transport 10 guests (plus luggage) at a time from the airport as flights arrive and back as they depart.
2. Body	Further details	<p>You can visit our website at www.marriott.com for additional information about our facilities such as gyms, a spa, and both indoor and outdoor swimming pools. Call us at 1-504-525-6500 if you have additional questions.</p>
3. Closing	Deadlines and/or action details	<p>Please book online as soon as possible to ensure that all 250 guests can be accommodated during your preferred date range. For such a large booking, we encourage you to call also during the booking process.</p> <p>Again, we are very grateful that you are considering the JW Marriott New Orleans for your conference. We look forward to making your stay memorable.</p> <p>Rufus Killarney, Booking Manager JW Marriott New Orleans</p>

[Return to the Positive Messages: Information, Requests, and Replies Topics menu](#)

Key Takeaway



Follow best practices when sharing information, requesting information or action, and replying to such messages.

Exercise



Choose a partner and email them a set of instructions following the message outline template and the example given in Table 6.1.3. It must be a procedure with at least five steps that is familiar to you (e.g., how to prepare your favorite drink) but unfamiliar to them. Can they follow your procedure and get the results you desire?

Reference

Stein, J. (2021, September 28). Yes, Sending an Email Can Create a Binding Contract. *Forbes*. Retrieved from <https://www.forbes.com/sites/joshuastein/2021/09/28/yes-sending-an-email-can-create-a-binding-contract/?sh=68de2b2950f2>

6.2: Complaints and Claims

Section 6.2 Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Write routine message types such as information shares, requests, and replies.

Business doesn't always go smoothly. Customers can be disappointed with a faulty product or poor service; shipments might get damaged en route, lost, or arrive late; or one business might infringe on their rights and freedoms. In all such cases, the offended party's responsibility is to make the offending party aware of what went wrong and request a remedy. Indeed, it is their consumer right to do so, and the business or organization receiving such a message should take it as valuable information about customer expectations that must be met for the company to remain viable.

A **claim** explains what went wrong and demands compensation from the offending party, whereas a **complaint** explains what went wrong and merely demands correction or apology. Minor complaints are best communicated in person, on the phone, or by email (if it's important to have them in writing) so they can be dealt with quickly. More serious complaints or claims are delivered as formal letters to provide a paper trail if they need to be used as evidence in a lawsuit.

Though some believe that a strongly worded complaint or claim is an effective way of getting what they want, you can catch more flies with honey than with vinegar ([Michael, 2007, #3](#)). In other words, if you are nice about communicating your problem with a situation or business transaction, the customer service representative (CSR) or manager dealing with it is more likely to give you what you want. Just because some customers have found success bullying people who are only trying to do their jobs, not all such attempts will likewise succeed, nor is it right from a moral standpoint, especially when the CSR had nothing to do with the complaint.

Ineffective complaints or claims often merely vent frustrations, issue threats, don't state the desired remedy (or only vaguely imply it), or demand completely unreasonable compensation. Demanding a lifetime supply of milk from your grocery store because one carton happened to be rotten will result in nothing because the manager or CSR will dismiss it altogether as ridiculous opportunism. Threatening to shop elsewhere makes you sound like a lost cause and, therefore, not worth losing any more time or money over. Since such messages are usually aggressive (or passive-aggressive) in tone and consequently rude and offensive, the recipient may respond aggressively and give the complainant much less than what they asked for (e.g., a mere apology rather than compensation or replacement) or ignore the complaint altogether. Often the reader of such messages is

not the one at fault, so a hostile message would be especially ineffective and possibly even actionable in extreme cases—i.e., liable to cause damages that the recipient could pursue compensation for in court.

Assume that a business will take your complaint or claim seriously if it is done right because, no matter what the industry, companies are rightly afraid of losing business to negative online reviews. According to one study, even one negative review can cost a business 22% of its customers and three negative reviews 59% of them ([Arevalo, 2017](#)). One mother’s endorsement or warning to others about a local store in a local mom’s group on Facebook could make or break that business. Even worse, complaints aired on social media, shared widely to the point of going viral, and picked up by news outlets, can destroy all but the too-big-to-fail companies or at least cause serious damage to their brand. In this digital age, good customer service is crucial to business survivability. A complaint provides a business with valuable information about customer expectations and an opportunity to win back a customer—as well as their social network if a good endorsement comes of it from the now-satisfied customer—or else risk losing much more than just the one customer.

Effective complaints or claims are politely worded and motivated by a desire to correct wrongs and save the business relationship. They’re best if they remind the business that you’ve been a loyal customer (if that’s true) and want to keep coming back, but you need them to prove that they value your business after whatever setback prompted the complaint. If the writer of such messages plays their cards right, they can get more than they originally bargained for.

Complaints and Claims Topics

- [6.2.1: Complaint or Claim Message Organization](#)
- [6.2.2: Replies to Complaints or Claims](#)
- [6.2.2.1: Apologizing](#)
- [6.2.2.2: Social Media Response Flowchart](#)

6.2.1: Complaint or Claim Message Organization

Complaints and claims take the direct approach of message organization even though they arise from dissatisfaction. They follow the usual three-part message organization we’ve seen before:

1. **Opening:** To be effective at writing a complaint or claim, describe in the opening clearly, precisely, and politely what you would like to achieve with your message. If you want financial compensation or a replacement product in the case of a claim, be clear about the amount or model. You could also suggest equivalent or alternative compensation if it is unlikely that your request will be honored. If you want an error to be corrected or an apology in response to your complaint, be upfront about it.
2. **Body:** The message body justifies the request by describing the desired outcome while chronologically stating what has happened and what went wrong. Be objective in recalling the facts because an angry tone coming through in negative words, accusations, and exaggerations will only undermine the validity

of your complaint or claim. Be precise in such details as names, dates and times, locations (addresses), and product names and numbers. Wherever possible, provide and refer to evidence. For instance, you may include copies (definitely not originals) of documentation such as receipts, invoices, work orders, bills of lading, emails (printed), phone records, photographic evidence, and even video (e.g., of a damaged product).

3. **Closing:** No matter what prompted the complaint or claim, the closing must be politely worded with action requests (e.g., a deadline) and goodwill statements. Impolite, rude, or even passive-aggressive wording will only invoke resilience in the reader, and your request will likely be rejected. By complimenting the recipient's company, however, your chances of getting what you wanted and perhaps even something extra are much higher. In damage-control mode, the business wants you to feel compelled to tell your friends that the company turned it around.

Table 6.2.1: Outline for Complaints or Claims

Outline	Content	Example Message
Subject Line	3- to 7-word title	Refund for unwanted warranty purchase
1. Opening	Main action request	Greetings: Please refund me for the \$89.99 extended warranty that was charged to my Visa despite being declined at the point of sale.
2. Body	Narrative of events justifying the claim or complaint	This past Tuesday (June 12), I purchased an Acer laptop at the Belleville location of Future Shock Computers and was asked by the sales rep if I would like to add a 3-year extended warranty to the purchase. I declined and we proceeded with the sale, which included some other accessories. When I got home and reviewed the receipt (please find the PDF scan attached), I noticed the warranty that I had declined was added to the bill after all.
3. Closing	Deadlines and/or submission details	Please refund the cost of the warranty to the Visa account associated with the purchase by the end of the week and let me know when you've done so. I have enjoyed shopping at Future Shock for the great prices and customer service. I would sincerely like to return to purchase a printer soon. Much appreciated! Samantha

Notice that the final point in the closing suggests to the store manager that they have an opportunity to continue the business relationship if all goes well with the correction.

[Return to the Complaints and Claims Topics menu](#)

6.2.2: Replies to Complaints or Claims

A message in which a company grants what the complainant or claimant has asked for is called an **adjustment** message. An adjustment letter or email is highly courteous in letting the disappointed customer know that they are valued and will be (or have already been) awarded what they were asking for, and possibly even more. Companies may use coupons for discounts on future purchases to win back the customer's confidence, hoping that in return, the customer will tell their friends that the store or company is worthy of their business after all. An adjustment message takes the direct approach by immediately delivering the good news about granting the claimant's request. Though you would probably start with an apology if this situation arose in person, starting on a purely positive note is more effective in a written message. The tone of the message is fundamental, as is avoiding blaming the customer—even if they're partly to blame or if part of you still suspects that the claim is not entirely valid. If you will grant the claim, write it whole-heartedly, providing good customer service on behalf of your company.

Though a routine adjustment letter might skip a message body, a more serious one may need to detail how you are complying with the request or take the time to explain what your company is doing to prevent the error again. Doing this makes the reader feel as though making an effort to write will have made a positive impact in the world, however small, because it will benefit not only you but also everyone else who won't have to go through what you did. Even if you have to explain how the customer can avoid this situation in the future (e.g., by using the product or service as it was intended), putting the responsibility partly on their shoulders, do so in entirely positive terms. An apology might also be appropriate in the message body (see §6.2.2.1 below).

Table 6.2.2: Outline for Complaints or Claims

Outline	Content	Example Message
Subject Line	Identify the previous subject line	Re: Refund for unwanted warranty purchase
1. Opening	Main point about granting the request	<p>Hello, Samantha:</p> <p>Absolutely, we would be happy to refund you for the \$90 warranty mistakenly charged along with your purchase of the Acer laptop. For your inconvenience, we will also offer you a \$20 gift card for future purchases at our store.</p> <p>To receive your refund and gift card, please return to our Belleville location with your receipt and the credit card you purchased the computer with so that we can credit the same card \$90. (For consumer protection reasons, we are unable to complete any transactions without the card.)</p>
2. Body	Details of compliance and/or assurances of improved process	<p>We are sorry for inconveniencing you and will speak with all sales staff about the importance of carefully checking the accuracy of any bill of sale before sending the order for payment. To ensure that this doesn't happen again, we will also instruct sales staff to confirm with customers whether an extended warranty appearing on the sales bill is there with consent before completing any transaction.</p> <p>We appreciate your choosing Future Shock for your personal electronics and look forward to seeing you soon to credit your Visa card and provide you with the best deal in town on the printer you were looking to purchase.</p>
3. Closing	Courteous statements expressing confidence in future business relations	<p>Have a great day!</p> <p>Melissa</p>

When a claim or complaint does not warrant an adjustment and such rejection must be communicated to the customer, a compelling negative message must be written, as described in section 6.3.2.

6.2.2.1: Apologizing

Most customers welcome or even expect an apology to win back their confidence in the company and to continue to do business with them. The problem arises when such apologies create a cause of action in legal proceedings when the company implies admitting the wrongdoing by simply apologizing to the customer. Courts had viewed such apologies as admitting misconduct, especially when it involved injury or damage to property. For this reason, it is essential to consult with a manager or the company's legal department before apologizing to a customer or other stakeholders in writing.

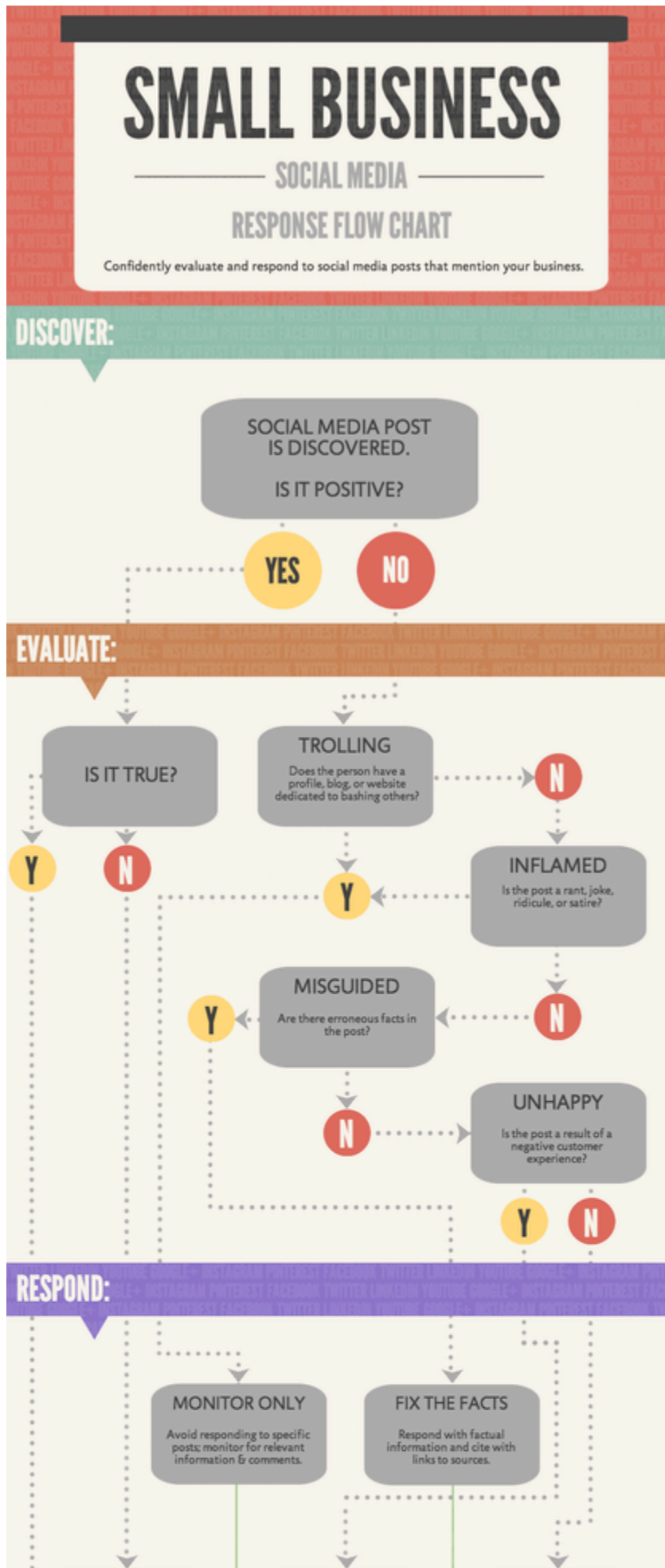
Legal repercussions are not expected if apologizing for a minor mistake, such as sending the wrong color dress in the order. It is certainly something a customer service representative should do to appease an upset customer. Such an apology should be sincere, responsible, specific, and improvement-focused. *“Sorry for*

your inconvenience” is just a trite phrase that may only anger the customer even more. A more specific and sincere apology should be provided instead: “*We are sincerely sorry for providing the dress in the incorrect color*” sounds more honest. If approved by legal counsel or your manager, the mistake should be admitted and full responsibility should be taken for it instead of trying to come up with excuses or blaming others. A sincere apology is also specific, providing identifiable details and persons responsible for the action. Most importantly, to regain the customer’s confidence and future business, it is imperative to provide information about how the company will ensure that such mishaps will not happen again.

Apologizing may be necessary when you are not really in the wrong, but the customer’s or public’s perception is that you are. In crisis communications, effective apologies show that you care enough about your existing and potential customers to say and do what it takes to win back their trust and confidence in you. You can do this without falsely claiming that you made an error (if you genuinely didn’t) by saying that you apologize for the misunderstanding. Dismissing complaints and doubling down on a mistake, on the other hand, shows disrespect for the people your success depends on.

6.2.2.2: Social Media Response Flowchart

Business entities often provide their customer representative with a flowchart describing how to properly respond to social media posts that mention the company. Please see the example below. (Source: [How to Choose Which Social Media Platforms Are Right for Your Business](#))



[Return to the Complaints and Claims Topics menu](#)

Key Takeaway



When something goes wrong in a commercial situation, courteous communication is essential when both asking for and responding to complaints and claims.

Exercises



1. If you've ever felt mistreated or taken advantage of in a business transaction but did nothing about it, write a complaint or claim letter asking that the company correct the wrong following the guidance in [§8.2.1](#) above. You don't need to actually send it, but do so if you feel strongly about it and feel as though you have a reasonable chance at success.
2. Put yourself in the shoes of the company that you wrote to in the previous exercise. Write a response to your message following the advice in [§8.2.2](#) above.

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6.3: Negative Messages

Section 6.3 Learning Objective



1. Organize and write negative messages.

Just as in life, the workplace isn't always sunny. Sometimes things don't go according to plan. It is your job to communicate negative aspects that don't ruin your relationships with customers, coworkers, managers, the public, or any other stakeholders. Bad-news or so-called negative messages require care and skillful language because your main point will likely meet with resistance. People will generally have a negative reaction when told that they're laid off, their application has been rejected, their shipment got lost on the way, prices or rates are increasing, their appointment has to be moved back several months, or they're losing their benefits. Although some people may prefer to receive bad news directly, in most cases, you can assume that the receiver will appreciate or even benefit from a more tactful, indirect approach. Keep in mind the following advice whenever required to deliver unwelcome news.

Negative Messages Topics

- [6.3.1: The Seven Goals of Negative Messages](#)
- [6.3.2: Indirect Approach to Negative Messages](#)
- [6.3.2.1: Negative Message Buffer](#)
- [6.3.2.2: Justification of Negative Messages](#)
- [6.3.2.3: Negative Messages and Redirection](#)
- [6.3.3: Mitigating Negative Messages](#)
- [6.3.3.1: Avoid Negative or Abusive Language](#)
- [6.3.3.2: Avoid Oversharing but Tell the Truth](#)
- [6.3.3.3: Respect the Recipient's Privacy](#)
- [6.3.4: Crisis Communication](#)
- [6.3.5: Direct Approach Bad-news Messages](#)
- [6.3.6: Examples of Closing Paragraphs](#)

6.3.1: The Seven Goals of Bad-news Messages

Your ability to manage, clarify, and guide the understanding of the recipient of your message is key to

addressing challenging situations while maintaining trust and integrity with customers, coworkers, managers, the public, and other stakeholders. Keep in mind these seven goals when delivering bad news in person or in writing:

1. Negative messages should be clear and concise and provide all important facts and information
2. Provide the recipient with information to understand and accept that bad news.
3. Express sympathy and empathy to reduce the anxiety caused by negative news.
4. Retain the customer's confidence and future business by respectful and trustworthy communication.
5. Use appropriate channels and timing for delivering the bad news.
6. Check with a supervisor to avoid legal liability by admitting negligence or guilt.
7. Ensure the desired business outcome.

Figure 6.3.1: The following five-step process can also be helpful when conveying negative messages

Explaining clearly and completely

- Readers understand and, in the best case, accept the bad news.
- Recipients do not have to call or write to clarify the message.

Projecting a professional image

- Writers stay calm, use polite language, and respond with clear explanations of why a negative message was necessary even when irate customers sound threatening and overstate their claims.

Conveying empathy and sensitivity

- Writers use language that respects the readers and attempts to reduce bad feelings.
- When appropriate, writers accept blame and apologize without creating legal liability for the organization or themselves.

Being fair

- Writers show that the decision was fair, impartial, and rational.

Maintaining friendly relations

- Writers demonstrate their desire to continue pleasant relations with the receivers and to regain their confidence.

The following example is a workplace situation where you as a supervisor must mitigate an issue when an employee has been consistently arriving late to work. The individual's actions negatively impact the entire team, and your task is to speak to the employee about this situation.

At first, it may seem like you have several options:

1. Speak to the employee at the workplace by simply stating that if they don't start coming to work on time, their employment will be terminated.
2. Invite the employee to an upscale restaurant for lunch and explain the situation.
3. Write a stern email.
4. Speak with the employee in the privacy of your office.

Only the last alternative meets the seven goals in delivering negative messages, but we will discuss why the other options are less than desirable in this situation.

Discussing personnel matters in front of other employees is not only tactless, but it may also cause liability issues. Confronting an employee with a short blunt statement does not provide additional information and is likely to prompt a hostile response. It is human nature to become defensive when accused of wrongdoing, especially if done in front of others.

Inviting the employee to a restaurant can provide opposing verbal communication clues than what is truly intended, which may lead to misunderstanding and worsening of the situation. Employees are typically invited to upscale lunches to celebrate a promotion or a similar accomplishment, but certainly not when discussing one's tardiness and possible termination of employment.

From a legal liability standpoint, writing an email will dispense written evidence of what has been said on your part, which could be used in a possible wrongful termination dispute. Since the employee's immediate reaction will not be visible while reading your email, this is certainly not the best channel to discuss such a sensitive issue. Also, you may accidentally send emails to unintended recipients, and they can also be forwarded by a disgruntled employee, potentially causing more liability problems.

Beginning the private meeting with a sympathetic statement that you have been worried about the employee's work lately and asking whether everything is okay is a much better way to begin your investigation into the matter. The employee may respond by providing a plausible explanation right away or you may have to offer specific work-related mistakes that the employee has made to prompt an acknowledgment. From your tone of voice, the employee should feel that you are genuinely concerned and not authoritatively demanding (although you may have all the right to do so). Finding a replacement for an otherwise valuable employee is much less cost-effective than keeping an existing one.

One additional point to consider as you document this interaction is the need to present the warning in writing. You may elect to prepare a memo that outlines the information concerning the employee's performance and tardiness and have it ready should you want to present it. If the session goes well, and you have the discretion to make a judgment call, you may elect to give him another week to resolve the issue. Even if it goes well, you may want to present the memo, as it documents the interaction and serves as evidence of due process should the employee's behavior fail to change, eventually resulting in the need for termination. This combined approach of a verbal and written message is increasingly the norm in business communication ([Business Communication for Success](#), 2015, 17.1).



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6.3.2: Indirect Approach to Negative Messages

The indirect approach should be used when delivering negative messages in situations when the news may be upsetting to the recipient, may provoke a hostile reaction, could threaten the relationship with a customer, or when the negative information is unexpected:

Figure 6.3.2: Determining when to use an indirect pattern is dependent on the communication situation



Suppose you bluntly state the really bad news. In that case, you risk the recipient rejecting or misunderstanding it because they may be too distracted with anger or sadness to rationally process the explanation or instructions for what to do about the bad news. The key to avoiding misunderstandings when delivering bad news is to follow the four-part organization of negative messages:

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

This is much like the three-part structure we've seen before. Only the body is now divided into two distinct parts where the order matters, as we see in Table 6.3.2 and the explanation for each part below it.

Table 6.3.2: Bad-news Message Outline and Example Message

Part	Example Message
1. Buffer	Thank you for your order. We appreciate your interest in our product and are confident you will love it.
2. Explanation	We are writing to let you know that this product has been unexpectedly popular with over 10,000 orders submitted on the day you placed yours.
3. Bad news + redirect	This unexpected increase in demand has resulted in a temporary out-of-stock/backorder situation. Despite a delay of 2–3 weeks, we will definitely fulfill your order as it was received at 11:57 p.m. on October 9, 2018, as well as gift you a \$5 coupon toward your next purchase.
4. Positive action closing	While you wait for your product to ship, we encourage you to use the enclosed \$5 coupon toward the purchase of any product in our online catalog. We appreciate your continued business and want you to know that our highest priority is your satisfaction.

([Business Communication for Success, 2015, 17.1](#))

6.3.2.1: Negative Message Buffer

Begin with neutral or positive statements that set a welcoming tone and serve as a buffer for the information to come. A buffer softens the blow of bad news like the airbag in a car softens the driver's collision with the steering wheel in a high-speed car accident. If any silver linings can calm the poor person about to be battered by the dark thunder clouds of bad news, here at the beginning would be a good time to point them out. The following are some possible buffer strategies:

- **Good news:** If there's good news and bad news, start with the good news.
- **Compliment:** If you're rejecting someone's application, start by complimenting them on their efforts and other specific accomplishments you were impressed by in their application.
- **Gratitude:** Say thanks for whatever positive things the recipient has done in your dealings with them. If they've submitted a claim that doesn't qualify for an adjustment, thank them for choosing your company.
- **Agreement:** Before delivering bad news that you're sure the recipient will disagree with and oppose, start with something you're sure you both agree on. Start on common ground by saying, "*We can all agree that . . .*"
- **Facts:** If positives are hard to come by in a situation, getting started on the next section's explanation, starting with cold, hard facts, is the next best thing.
- **Understanding:** Again, if there are no silver linings to point to, showing you care by expressing sympathy and understanding is a possible alternative (Guffey et al. 2016, p. 194).
- **Apology:** If you're at fault for any aspect of a bad-news message, an apology is appropriate as long as it won't leave you at a disadvantage in legal proceedings that may follow as a result of admitting

wrongdoing. (See §6.2.2.1 above for more on effective strategies for apologizing.)

The idea here is not to fool the audience into thinking that only good news is coming but putting them in a receptive frame of mind to understand the following explanation. If you raise the readers' expectation that they're going to hear only the good news they want, just to let them down near the end, they will be even more disappointed for being misled. Suppose you bluntly blast the bad news right away, however. In that case, they may be more distracted by emotion to rationally process the explanation or instructions for what to do about the bad news.

6.3.2.2: Justification of Negative Messages

The **justification** section of negative messages explains the background or context for the bad news before delivering the bad news itself. Let's say that you must reject an application, claim for a refund, or request for information. In such cases, the explanation could describe the strict acceptance criteria and high quality of applications received in the competition, the company policy on refunds, its policy on allowable disclosures, and the legalities of contractually obligated confidentiality. Your goal with the explanation is to be convincing so that the reader says, "That sounds reasonable," and similarly accepts the bad news as inevitable given the situation you describe. On the other hand, if you make the bad news seem like mysterious and arbitrary decision-making, your audience will probably feel like they've been treated unfairly and might even escalate further with legal action or "yelptribution"—avenging the wrong on social media. While an explanation is ethically necessary, never admit or imply responsibility without written authorization from your company, cleared by legal counsel if there's any way that the justification might be seen as actionable (i.e., the offended party can sue for damages). Use additional strategies to make the justification more agreeable, such as focusing on benefits. If you're informing employees that they will have to pay double for parking passes next year in an attempt to reduce the number of cars filling up the parking lot, you could sell the idea on the health benefits of cycling to work or the environmental benefit of fewer cars polluting the atmosphere. If you're informing a customer asking why a product or service can't include additional features, you could say that adding those features would drive the cost up, and you would rather respect your customer's pocketbooks by keeping the product or service more affordable. In any case, try to pitch an agreeable benefit rather than saying that you're merely trying to maximize company or shareholder profits.

6.3.2.3: Negative Messages and Redirection

Burying the bad news itself in the message is a defining characteristic of the indirect approach. Far from intending to hide the bad news, the indirect approach frames the bad news so that it can be properly understood and its negative (depressing or anger-arousing) impact minimized.

The goal is also to be clear in expressing the bad news so that it isn't misunderstood while also being sensitive to your reader's feelings. If you're rejecting a job applicant, you can be clear that they didn't get the job without

bluntly saying, “*You failed to meet our criteria*” or “*You won’t be working for us anytime soon.*” Instead, you can imply it by putting the bad news in a subordinate clause in the passive voice:

Though another candidate was hired for the position, . . .

The passive voice enables you to draw attention away from your own role in rejecting the applicant and away from the rejected applicant in the context of the competition itself. Instead, you focus on the positives of someone getting hired. While the rejected applicant probably won’t be throwing a celebration party for the winning candidate, the subordinate clause here allows for speedy redirection to a consolation prize.

Redirection is key to this type of bad news’ effectiveness because it quickly shifts the reader’s attention to a plausible alternative to their original request. Offering a coupon or store credit, if available, will make accepting the bad news or rejection easier and will be appreciated as being better than nothing. Even if you’re not able to offer the reader anything of value, you could at least say something nice. In that case, completing the sentence in the previous paragraph with an active-voice main clause could go as follows:

. . . we wish you success in your continued search for employment.

This way, you avoid saying anything negative while still clearly rejecting the applicant.

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6.3.3: Mitigating Negative Messages

Delivering bad news can be dangerous if it angers the reader so much that they are motivated to seek revenge. If you’re not careful with what you say, that message can be used as evidence in a court case and could compromise your position when read by a judge or jury. You can lower the risk of being litigated by following the general principles given below when delivering bad news.

6.3.3.1: Avoid Negative or Abusive Language

Sarcasm, profanity, harsh accusations, and abusive or insulting language may feel good to write in a fit of anger but, in the end, make everyone’s lives more difficult. When someone sends an inflammatory message and the reader interprets it as harmful to their reputation, it could legally qualify as **libel** that is legitimately actionable. Even if you write critically about a rival company’s product or service by stating (as if factually) that it’s dangerous, whereas your version of the product or service is safer and better, this can be considered **defamation** or libel. If said aloud and recorded, perhaps on a smartphone’s voice recorder, it is **slander** and can likewise be litigated. It’s much better to always write courteously and maturely, even under challenging circumstances, to avoid the fallout that involves expensive court proceedings.

6.3.3.2: Avoid Oversharing but Tell the Truth

When your job is to provide a convincing rationale that might make the recipient of bad news accept it as reasonable, be careful with what details you disclose. When rejecting a job applicant, for instance, you must be

especially careful not to lay all your cards on the table by sharing the winning and rejected candidates' scoring sheets, nor even summarizing them. Though that would give them a full picture, it would open you up to a flood of complaints and legal or human-rights challenges picking apart every little note. Instead, you would simply wish the rejected candidate luck in their ongoing job search. When you must provide detail, avoid saying anything negative about anyone so that you can't be accused of libel and taken to court for it. Provide only as much information as is necessary to provide a convincing rationale.

At the same time, you must tell the truth so that you cannot be challenged on the details. If you are inconsistent or contradictory in your explanation, it may invite scrutiny and accusations of lying. Even making false claims by exaggerating may give the reader the wrong impression, leading to serious consequences. Although avoiding providing some facts may appear as dishonest, you must protect your organization and avoid triggering hostile behavior from the recipient.

6.3.3.3: Respect the Recipient's Privacy

Criticizing an employee in a group email or memo—even if the criticism is fair—is mean, unprofessional, and an excellent way of opening yourself to a world of trouble. People who call out others in front of a group create a chilly climate in the workplace, leading to fear, loathing, and a loss of productivity among employees, not to mention legal challenges for possible libel. Called-out employees may even resort to sabotaging the office with misbehavior such as vandalism, cyberattacks, or theft to get even. Always maintain respect and privacy when communicating bad news as a matter of proper professionalism ([Business Communication for Success, 2015, 17.1](#)).

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6.3.4: Crisis Communications

A rumor that the CEO is ill pulls down the stock price. A plant explosion harms several workers and requires evacuating residents in several surrounding city blocks. Risk management seeks to address such risks, including prevention as well as liability, but emergency and crisis situations happen anyway. Employees also make errors in judgment that can damage the public perception of a company. The mainstream media does not lack stories involving addiction or abuse that require a clear response from a company's standpoint. It is crucial to respond to such negative information even if it brings unwanted attention to the company because, with active engagement, the company can control the narrative that appears in the media. If the storytelling is left to the press, factual information may be distorted or sensationalized, and the corporation may not have any venues to safeguard what is being reported. In this chapter, we address the basics of a crisis communication plan, focusing on critical types of information during an emergency:

- What is happening?

- Is anyone in danger?
- How big is the problem?
- Who reported the problem?
- Where is the problem?
- Has a response started?
- What resources are on-scene?
- Who is responding so far?
- Is everyone's location known? (Mallet, Vaught, & Brinch, 1999)

You will be receiving information from the moment you know a crisis has occurred. Still, without a framework or communication plan to guide you, valuable information may be ignored or lost. These questions help you quickly focus on the basics of “who, what, and where” in the crisis.

A **crisis communication plan** is the prepared scenario document that organizes information into responsibilities and lines of communication before an event. If an emergency arises when you already have a plan, each person knows their role and responsibilities from a common reference document. Overall effectiveness can be enhanced with a clear understanding of roles and responsibilities for an effective and swift response. The plan should include four elements:

- Crisis communication team members with contact information
- Designated spokesperson
- Meeting place/location
- Media plan with procedures

A crisis communication team includes people who can decide what actions to take, carry out those actions, and offer expertise or education in the relevant areas. By designating a spokesperson prior to an actual emergency, your team addresses the inevitable need for information proactively. People will want to know what happened and where to get further details about the crisis. Lack of information breeds rumors that can make a bad situation worse. The designated spokesperson should be knowledgeable about the organization and its values; be comfortable in front of a microphone, camera, and media lights; and stay calm under pressure. Part of your communication crisis plan should focus on where you will meet to coordinate and communicate your activities in response to the crisis. In case of a fire in your house, you might meet in the front yard. In an organization, a designated contingency building or office some distance away from your usual place of business might serve as a central place for communication in an emergency that requires evacuating your building. Depending on the size of your organization and its facilities, the emergency plan may include exit routes, hazardous materials procedures (OSHA), and policies for handling bomb threats, for example. Safety is, of course, the priority, but in terms of communication, the goal is to eliminate confusion about where people are, where they need to be, and where information is coming from. Whether or not evacuation is

necessary when a crisis occurs, your designated spokesperson will gather information and carry out your media plan. They will need to make quick judgments about which information to share, how to phrase it, and whether certain individuals need to be notified of facts before they become public. The media and public will want to get reliable information, which is preferable to mere spin or speculation. Official responses help clarify the situation for the public, but an unofficial interview can make the tragedy personal and attract unwanted attention. Remind employees to direct all inquiries to the official spokesperson and never to speak anonymously or “off the record.” Enable your spokesperson to have access to the place you indicated as your crisis contingency location to coordinate communication and activities and allow them to prepare and respond to inquiries. When crisis communication is handled professionally, it seeks not to withhold information or mislead but to minimize the “spin damage” from the incident by providing necessary facts even if they are unpleasant or tragic ([Business Communication for Success, 2015, 17.3](#)).

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6.3.5: Direct Approach in Negative Messages

We’ve looked at expressing negative news using the indirect approach, which is most often used, but there are situations when it is better to use the direct approach and put the reader on notice right away. In the following situations, it is certainly appropriate to deliver bad news by getting right to the point:

- **When the bad news isn’t *that* bad:**
 - In the case of small price or rate increases, customers won’t be devastated by having to pay more. Indeed, inflation makes such increases an expected fact of life.
 - If your job involves routinely delivering criticism because you’re a Quality Assurance specialist, the people who are used to receiving recommendations to improve their work will appreciate the direct approach. Some organizations even require direct-approach communications for bad news as a policy because it is more time-efficient.
- **When you know that the recipient prefers or requires the direct approach:** Though the indirect approach is intended as a nice way to deliver negative news, some people would rather you be blunt. Since a message must always be tailored to the audience, getting permission to take the direct approach is your cue to follow through with precisely that. Not doing so may trigger the angry response you would have expected otherwise.
- **When you’re short on time or space:** One of the hallmarks of the indirect approach is that it takes more words than a direct-approach message (see Table 6.1.5 for comparative examples). If time is limited or you’re constrained in how much space you have to write, taking the direct approach is justifiable.
- **When the indirect approach hasn’t worked:** If this is the third time you’ve had to tell a client to pay their invoice and the first two were nicely worded indirect messages that the recipient ignored, take the kid gloves off and issue a stern warning of the consequences of not paying. You may need to threaten

legal action or say you'll refer the account to a collection agency, and you may need to put it in bold so that you're sure the reader won't miss it.

- **When the reader may miss the bad news:** You may determine from profiling your audience and their literacy level that they might not understand indirect-approach bad news. If your reader doesn't have a strong command of English vocabulary and misses words here and there, they may not pick up on the buried bad news past the mid-point of a challenging message.

In the above situations, structure your message following the same three-part organization we've seen elsewhere (e.g., §6.1.5–§6.1.7 on email parts):

1. **Opening:** State the bad news right upfront.
2. **Body:** Briefly explain why the bad news happened.
3. **Closing:** Express confidence in continued business relations with a goodwill statement and provide any action information such as contact instructions should the recipient require further information.

Of course, clarity and brevity in such messages are vital to maintaining friendly relations with your audiences (Guffey et al., 2016, p. 190).

6.3.6: Examples of Closing Paragraphs

1. *Thanks for your bid. We may be able to work with your talented staff when future projects demand your unique expertise.*

2. *Although the lot you saw last week is now sold, we do have two excellent lots available at a slightly higher price.*

3. *We appreciate your interest in our company, and we extend to you our best wishes in your search to find the perfect match between your skills and job requirements.*

4. *Your loyalty and concern about our frozen meals are genuinely appreciated. Because we want you to continue enjoying our healthy and convenient dinners, we are enclosing a coupon for your next nutritious Town Foods meal that you can redeem at your local market. (Guffey et al., 2022, p. 295)*

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Key Takeaway



Write carefully when addressing negative situations, such as delivering bad news, usually by burying the bad news after a buffer and rationale, and following it with redirection to minimize the harm that the message might cause.

Exercises



1. Think of a time when you were given bad news by email or letter, such as when you were told that a warranty couldn't be honored for the type of damage inflicted on your product or your application was rejected. How well did it fulfill or fail to fulfill the seven goals of delivering bad news (see [§6.3.1](#) and [§6.3.3](#))?
2. Sales have decreased for two consecutive quarters at your business. You must inform your sales team that their hours and base pay will be reduced by 20% if the company is to break even this quarter. While you may have a few members of your sales team that are underperforming, you can't afford to be short-staffed now, so you must keep the entire team for the time being. Write negative news messages in both the direct and indirect approach informing your sales team of the news following the advice in [§6.3.2](#) and [§6.3.5](#) above.
3. Research a crisis in your area of training or career field. What communication issues were present and how did they affect the response to the crisis? If the situation was handled well, what are the major takeaways? If handled poorly, what do you think you would have done differently following the general guidelines in [§6.3.4](#) above?

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Test Your Understanding

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CHAPTER 7: PERSUASION

Sumita Roy

Chapter Learning Objectives

1. Understand and apply persuasion.
2. Learn the basic concepts of classical rhetoric and Aristotle and the three appeals.
3. Review the [Principles of Persuasion](#).
4. Organize and write persuasive messages through the [Indirect AIDA Pattern of Persuasion](#).

Persuasion is a technique that involves motivating your audience by presenting arguments that convince them to adopt your view or do as you want. You've been doing this ever since you learned to speak. From convincing your parents to give you a treat to persuading them to lend you the car keys, you've developed more sophisticated means of persuasion over the years simply because of the rewards that come with their success. In the professional world, honing persuasive strategies for the workplace is vital to your livelihood when the reward is a sale, a promotion, or merely a regular paycheck.

Persuasion begins with motivation. If persuasion is a process and your audience's action (e.g., buying a product or service) is the goal, then motivating them to accept an argument or a series of positions leading to the decision that you want them to adopt helps achieve that goal. If your goal is to convince a pet owner to spay or neuter their pet, for instance, you would use a few convincing arguments compelling them to accept that spaying or neutering is the right thing to do.

Persuasive Messages Topics

- [7.1: Classical Rhetoric](#)
- [7.2: Aristotle and the Three Appeals](#)
- [7.3: Principles of Persuasion](#)
- [7.4: Indirect AIDA Pattern of Persuasion](#)

7.1: Classical Rhetoric

The study of the principles of good communication or the art of rhetoric began many centuries ago in ancient Greece and Rome. Classical scholars such as Aristotle (384–322 BC), Demosthenes (384–322 BC), Cicero (106–43 BC), and Quintilian studied communication at various places and arrived at certain conclusions. They identified certain factors as being crucial in planning and composing a message, for both oral and written communication. These factors included an understanding of the Audience, Writer, Purpose, and Place. Modern research in communication suggests that what these wise classical scholars suggested so long ago still hold true today.

An understanding of the audience is important because the writer can address directly and relate to the public, client, student, patient, employee, or whoever is reading the message. A knowledge of the audience helps the writer to adopt an appropriate style and language that the audience can understand. If you are announcing pay cuts due to Covid to employees, you need to adopt a sympathetic tone, provide reasons, and provide a timeframe to avoid anger and resentment.

Similarly, Purpose is important because the classical scholars believed that it helped the writer to tailor the message according to the needs of the audience. You don't need to tell everything you know to the audience—just enough so that the audience can take the appropriate action.

Place is important because it determines the language and tone. If you just landed your dream job after graduation, the tone of your message will be significantly different when you are announcing it to your grandmother at the dinner table as opposed to delivering a speech during the college career fair.

Finally, the Writer is important because whatever the writer is conveying is colored by his/her beliefs, education, and background. The classical scholars felt that the Writer should always be of a superior moral character. In other words, he/she has to be a model citizen.

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7.2: Aristotle and the Three Appeals

In order to persuade or argue effectively, Aristotle identified and suggested using the three “appeals” in a human brain. These three appeals are called *logos*, *ethos*, and *pathos*. *Logos* refers to the logical side of the human brain; in other words, a writer can convince an audience to do something based on logic. If the weather forecast predicts rain, then the most logical action would be to take an umbrella. *Ethos* refers to the ethical side of the human brain. Aristotle believed that a person could be persuaded to adopt an appropriate action by appealing to the ethical aspect of human nature. Donating money, food, or clothing for children in war-ravaged Ukraine is a direct response to an ethical appeal. *Pathos* refers to the emotional side of the human brain. Effective marketing and advertising messages are designed to appeal to the emotional side of the human brain. Selling a car or a bottle of shampoo efficiently exploits a person's desire to own something or look attractive.

Scholars of rhetoric in later times combined these appeals in what is called a **Rhetorical Triangle**. *Logos*

or the logical side is associated with **text**, *ethos* or the ethical side with the **role of the writer**, and *pathos* or the emotional side with the **role of the audience**. Thus, a text is generated based on the unique relationship between the roles of the writer and the audience. The relationship between the writer and audience will vary in each communication task. Examples of the use of these three appeals in writing are as follows:

Logos

Has the writer provided details to substantiate her claims in the résumé?

What evidence and supporting material has the writer provided in a Claims Letter?

Ethos

Did the secretary's speech reveal inclusive components?

Was the writer's tone and language appropriate in the Rejection Letter?

Pathos

Does the writer of the memo accommodate the interests of the employees?

Does the writer reveal a thorough knowledge of the audience in the report?



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7.3: Principles of Persuasion

What's the best way to succeed in persuading people to buy what you're selling? Though there may sometimes be a single magic bullet, a combination of strategies has been found to be most effective. Social psychologist Robert Cialdini offers us six principles of persuasion that are powerful and effective no matter what the cultural context. Use them to help persuade people, but also recognize their use by others when determining how you're being led toward a purchase and perhaps even one you should rightly resist.

- [7.3.1: Reciprocity](#)
- [7.3.2: Scarcity](#)
- [7.3.3: Authority](#)
- [7.3.4: Commitment and Consistency](#)
- [7.3.5: Consensus](#)
- [7.3.6: Liking](#)

7.3.1: Principle of Reciprocity

I scratch your back; you scratch mine. Reciprocity means that when you give something to somebody, they feel obligated to give something back to you in return, even if only by saying “thank you.” If you are working in customer service and go out of your way to meet the customer's need, you are appealing to the principle of

reciprocity with the knowledge that most among us perceive the need to reciprocate—in this case, by increasing the likelihood of making a purchase from you because you were especially helpful. Reciprocity builds trust and a relationship develops, reinforcing everything from personal to brand loyalty. By taking the lead and giving, you build in a moment a sense of obligation motivating the receiver to follow social norms and customs by giving back.

7.3.2: Principle of Scarcity

It's universal to want what you can't have. People are naturally attracted to the rare and exclusive. If they are convinced that they need to act now or it will disappear, they are motivated to act. Scarcity is the perception of dwindling supply of a limited and valuable product. For a sales representative, scarcity may be a key selling point—the particular car, theater tickets, or pair of shoes you are considering may be sold to someone else if you delay making a decision. By reminding customers not only of what they stand to gain but also of what they stand to lose, the sales rep increases the chances of swaying the customer from contemplation to action, which is to close the sale.

7.3.3: Principle of Authority

Notice how saying “According to researchers, . . .” makes whatever you say after these three words sound more true than if you began with “I think that . . .” This is because you're drawing on authority to build trust (recall the concept of *ethos* from the rhetorical triangle discussed earlier), which is central to any purchase decision. Who does a customer turn to? A salesperson may be part of the process, but an endorsement by an authority holds credibility that no one with a vested interest can ever attain. Knowledge of a product, field, trends in the field, and even research can make a salesperson more effective by the appeal to the principle of authority. It may seem like extra work to educate your customers, but you need to reveal your expertise to gain credibility. We can borrow a measure of credibility by relating what experts have indicated about a product, service, market, or trend, and our awareness of competing viewpoints allows us insight that is valuable to the customer. Reading the manual of a product is not sufficient to gain expertise—you have to do extra homework. The principle of authority involves referencing experts and expertise.

7.3.4: Principle of Commitment and Consistency

When you commit to something, you feel obligated to follow through on it. For instance, if you announce on social media that you're going to do yoga every day for a month, you feel greater pressure to actually do so than if you resolved to do it without telling anyone. This is because written words hold a special power over us when it feels as though their mere existence makes what we're doing “official.” If we were on the fence, seeing it now

in writing motivates us to act on it and thereby honor our word by going through with the purchase. In sales, this could involve getting a customer to sign up for a store credit card or a rewards program.

7.3.5: Principle of Consensus

If you make purchase decisions based on what you see in online reviews, you're proving how effective the principle of consensus can be. People trust first-person testimonials when making purchase decisions, especially if there are many of them and they're unanimous in their endorsement. The herd mentality is a powerful force across humanity. If "everybody else" thinks this product is great, then it must be great. Such *argumentum ad populum* (Latin for "argument to the people") is a logical fallacy because there's no guarantee that something is true if the majority believe it. We are genetically programmed to trust our tribe in the absence of more credible information because it makes decision-making easier in the fight for survival.

7.3.6: Principle of Liking

We are more likely to buy something from someone we like, who likes us, who is attractive, and who we can identify with because we see enough points of similarity between ourselves. These perceptions offer a sense of safe belonging. If a salesperson says they're going to cut you a deal because they like you, your response is to reciprocate that acceptance by going through with the deal. If you find them easy to look at—no matter which sex—you are predisposed to like them because, from an evolutionary standpoint, attractiveness suggests genetic superiority and hence authority. Furthermore, if the salesperson makes themselves relatable by saying that they had the same problem as you and this is what they did about it, you're more likely to follow their advice because that bond produces the following argument in your mind: "This person and I are similar in that we share a common problem, they solved it expertly by doing X, and I can therefore solve the same problem in my life by doing X" (*Business Communication for Success*, 2015, 14.2).

To summarize, a persuasive message can succeed through the principles of reciprocity, scarcity, authority, commitment and consistency, consensus, and liking.

Watch the following 12-minute RSA animated video, *The Science of Persuasion*



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=575#oembed-2>

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7.4: Indirect AIDA Pattern of Persuasion

When you consider the tens or hundreds of thousands of TV commercials you've seen in your life, you understand how they all take the indirect approach (typically associated with delivering bad news, as we saw earlier) because they assume you will resist parting with your money. Instead of taking a direct approach by simply saying in seven seconds “Come to our store, give us \$100, and we'll give you these awesome sunglasses,” commercials use a variety of techniques to motivate you to ease your grip on your money. They will dramatize a problem-solution scenario and use celebrity endorsements, humor, special effects, jingles, intrigue, and so on. You're well familiar with the pattern from having seen and absorbed it many times each day of your life, but when you must make a persuasive pitch yourself as part of your professional duties, you may need a little guidance with the typical four-part indirect pattern known as “AIDA”:

- [7.4.1: A—Attention-getting Opening](#)
- [7.4.2: I—Interest-building Body](#)
- [7.4.3: D—Desire-building Details and Overcoming Resistance](#)
- [7.4.4: A—Action-motivating Closing](#)

7.4.1: A—Attention-getting Opening

When your product, service, or initiative is unknown to the reader, come out swinging to get their attention with a surprise opening. Your goal is to make it inviting enough for the reader to want to stay and read the whole message. The opening can only do that if it uses an original approach that connects the reader to the product, service, or initiative with its central selling feature. This feature is what distinguishes it from others of its kind; it could be a new model of (or feature on) a familiar product, a reduced price, a new technology altogether, etc. A tired, old opening sales pitch that appears to be aimed at a totally different demographic with a product that doesn't seem to be any different from others of its kind, however, will lose the reader at the opening pitch. One that uses one of the following techniques, however, stands a good chance of hooking the reader in to stick around and see if the pitch offers an attractive solution to one of their problems:

- Focus on the **solution's benefits**:
 - *Imagine cooling down from your half-hour sunbath on the white-sand beach with a dip in turquoise Caribbean waters. This will be you if you book a Caribbean Sun resort vacation package today!*
 - *What if I told you that you could increase your sales by 25% in the next quarter by using an integrated approach to social media?*
 - *Consider a typical day in the life of a FitBit user: . . .*
- Focus on the **problem scenario**:
 - *Is your hard-earned money just sitting in a checking account losing value from inflation year after*

year?

- *Have you ever thought about investing your money but have no idea where to start?*
- **Surprising quotation, fact, or statistic:**
 - *Yogi Berra once said, “If you come to a fork in the road, take it!” At Epic Adventures, any one of our Rocky Mountain hiking experiences will elevate you to the highest of your personal highs.*
 - *The shark is the ocean’s top predator. When you’re looking to invest your hard-earned money, why would you want to swim with sharks? Go to a trusted broker at Lighthouse Financial.*
 - *Look around the room. One in five of you will die of heart disease. Every five minutes, somebody aged 20 or over dies from heart disease, the second leading cause of death. At the Fitness Stop, keep your heart strong with your choice of 20 different cardio machines and a variety of aerobics programs designed to work with your busy schedule.*

The goal here is to get the reader thinking, “Oooh, I want *that*” or “I *need* that” without giving them an opportunity to doubt whether they really do. Of course, the attention-gaining opening is unnecessary if the reader already knows something about the product or service. If the customer comes to you asking for further details, you would just skip to the I-, D-, or A-part of the pitch that answers their questions.

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7.4.2: I—Interest-building Body

Once you’ve got the reader’s attention in the opening, your job is now to build on that by extending the interest-building pitch further. If your opening was too busy painting a solution-oriented picture of the product to mention the company name or stress a central selling feature, now is the time to reveal both in a cohesive way. If the opening goes “What weighs nothing but is the most valuable commodity in your lives?—Time,” a cohesive bridge to the interest-building part of the message could be “At Synaptic Communications, we will save you time by . . .” Though you might want to save detailed product description for the next part, some description might be necessary here as you focus on how the product or service will solve the customer’s problem.

Key to making this part effective is describing how the customer will use or benefit from the product or service, placing them in the center of the action with the “you” view (see above):

When you log into your WebCrew account for the first time, an interactive AI guide will greet and guide you through the design options for your website step by step. You will be amazed by how easy it is to build your website from the ground up merely by answering simple multiple-choice questions about what you want and selecting from design options tailored to meet your individual needs. Your AI guide will automatically shortlist stock photo options and prepare text you can plug into your site without having to worry about permissions.

Here, the words *you* or *your* appear 11 times in 3 sentences while still sounding natural rather than like a high-pressure sales tactic.

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7.4.3: D—Desire-building Details and Overcoming Resistance

Now that you’ve hooked the reader in and hyped up your product, service, or idea with a central selling feature, you can flesh out the product description with additional **evidence** supporting your previous claims. Science and the rational appeal of hard facts work well here, but the evidence must be appropriate. A pitch for a sensible car, for instance, will focus on fuel efficiency with gallons per 100 miles or range in number of miles per battery charge in the case of an electric vehicle, not top speed or the time it takes to get from 0 to 100 m/h. Space permitting, you might want to focus on only two or three additional selling features since this is still a pitch rather than a product specifications (“specs”) sheet, though you can also use this space to point the reader to such details in an accompanying document or web page.

Testimonials and guarantees are effective desire-building contributions as long as they’re believable. If someone else much like you endorses a product in an online review, you’ll be more likely to feel that you too will benefit from it (see above on the principle of consensus). A **guarantee** will also make the reader feel as though they have nothing to lose if they can just return the product or cancel a service and get their money back if they don’t like it after all. Costco has been remarkably successful as a wholesaler appealing to individual grocery shoppers partly on the strength of a really generous return policy.

Rhetorically, this point in the pitch also provides an opportunity to raise and defeat objections you anticipate the reader having toward your product, service, or idea. This follows a technique called **refutation**, which comes just before the conclusion (“peroration”) in the six-part classical argument structure. It works to dispel any lingering doubt in the reader’s mind about the product as pitched to that point.

If the product is a herbicide being recommended as part of a lawn care strategy, for instance, the customer may have reservations about spreading harmful chemicals around their yard. A refutation that assures them that the product isn’t harmful to humans will help here, especially if it’s from a trusted source such as *Consumer Reports*. Other effective tricks in the vein of emotional appeal (complementing the evidence-based rational appeal that preceded it) include picturing a worst-case scenario resulting from not using the product. Against concerns about using a herbicide, a pitch could use scare tactics such as talking about the spread of wild parsnip that can cause severe burns upon contact with skin and blindness if the sap gets in your eyes. By steering the customer to picturing their hapless kids running naïvely through the weeds in their backyard, crying in pain, rubbing their eyes, and going blind, you can undermine any lingering reservations a parent may have about using the herbicide.

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7.4.4: A—Action-motivating Closing

The main point of your message directs the reader to act (e.g., buy your product or service), so its appearance

at the end of the message—rather than at the beginning—is what makes an AIDA pitch indirect. If the AID part of your pitch has the reader feeling that they have no choice but to buy the product or service, then this is the right time to tell them how and where to get it, as well as the price.

Pricing itself requires some strategy. The following are well-known techniques for increasing sales:

- **Charm pricing:** dropping a round number by a cent to make it end in a 99 because the casually browsing consumer brain’s left-digit bias will register a price of \$29.99 as closer to \$20 than \$30, especially if the 99 is physically smaller in superscript (\$29⁹⁹).
- **Prestige pricing:** keeping a round number round and dropping the dollar sign for a luxury item. For instance, placing the number 70 beside a dinner option on a fancy restaurant’s menu makes it look like a higher-quality dish than if it were priced at \$6,999. To impress a date with your spending power, you’ll go for the 70 option over something with charm pricing.
- **Anchoring:** making a price look more attractive by leading with a higher reference price. For instance, if you want to sell a well-priced item, you would strategically place a more expensive model next to it so that the consumer has a sense of the price range they’re dealing with when they don’t otherwise know. They’ll feel like they’re getting more of a bargain with the well-priced model. Similarly, showing the regular price crossed out near the marked-down price on the price tag is really successful in increasing sales ([Boachie, 2016](#)).

If the product or service is subscription-based or relatively expensive, breaking it down to a monthly, weekly, or even daily price installment works to make it seem more manageable than giving the entire sum. Equating it to another small daily purchase also works. The cost of sponsoring a child in a drought-stricken nation sounds better when it’s equated with the cost of a cup of coffee per day. A car that’s a hundred dollars per week in lease payments sounds more doable than the entire cost, especially if you don’t have \$45,000 to drop right now but are convinced that you must have that car anyway. Framing the price in terms of how much the customer will save is also effective, as is brushing over it in a subordinate clause to repeat the central selling point:

For only \$49.99 per month, you can go about your business all day and sleep easy at night knowing your home is safe with Consumer Reports’ top-rated home security system.

Action directions must be easy to follow to clinch customer buy-in. Customers are in familiar territory if they merely have to go to a retail location, pick the unit up off the shelf, and run it through the checkout. Online ordering and delivery is even easier. Vague directions (“See you soon!”) or a convoluted, multi-step registration and ordering process, however, will frustrate and scare the customer away. Rewards for quick action are effective (see above on the principle of scarcity), such as saying that the deal holds only while supplies last or the promo code will expire at the end of the day.

Sales pitches are effective only if they’re credible (see above on the principle of authority). Even one exaggerated claim can sink the entire message with the sense that it’s all just snake-oil smoke and mirrors. Saying

that your product is the best in the world but not backing this up with any third-party endorsement or sales figures proving the claim, will undermine every other credible point you make by making your reader doubt it all (Lehman, DuFrene, & Murphy, 2013, pp. 134–143). We'll return to the topic of avoidable unethical persuasive techniques, but first let's turn our attention in the next section to a more uplifting type of message.

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Key Takeaway



Use reliable strategies and persuasive indirect message patterns to persuade readers to buy products or services, adopt your ideas, or support initiatives.

Exercises



1. Recall a purchase where you were upsold or bought something that you later regretted after following the salesperson's advice. Break down how they were able to convince you to want something you didn't need to the point of acting on that desire. Identify which of the principles of persuasion (outlined in [§7.4](#) above) they used to get your dollar.
2. Let's say you have a database of customers who have consented to receiving notices of promotional deals and special offers from the company you work for in the profession of your choosing or an industry adjacent to it (e.g., if you're training to be a police officer, put yourself in the position of marketing for a company selling tasers to police departments). Write a one-page letter that will be mailed out to each convincing them to purchase a new product or service your company is offering. Follow the indirect AIDA pattern described in [§7.4.3](#) and involve some of the persuasive strategies summarized in [§7.4.2](#) above.

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CHAPTER 8: ELECTRONIC WRITTEN COMMUNICATION

Veronika Humphries

Chapter Learning Objectives

- Identify characteristics of effective professional emails.
- Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
- Select and use common, basic information technology tools to support communication.
- Discuss emerging netiquette standards in social media used for professional purposes.
- Use rapid electronic communication channels such as texting and instant messaging in a professional manner.

Electronic channels of communication, and among them especially emails, are the most used communication tools in a personal as well as in a business setting. Although the current generation of students is already familiar with the use of email, the rules and proper use in a professional setting can create some challenges. The aim of this chapter is to provide a foundation of information on how to use email professionally. The principles of netiquette will also be discussed to demonstrate the rules of proper email use and word choices to consider when composing an email at work. The aim of the sender of any electronic written communication is to demonstrate their polished professional presence regardless of the channel of communication they use.

- [8.1: Emails](#)
- [8.2: Netiquette and Social Media](#)
- [8.3: Text Messages and Instant Messaging](#)

8.1: Emails

Section 8.1 Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
2. Identify characteristics of effective professional emails.

Electronic mail, most often referred to as “e-mail” or just “email,” is by volume the most popular written communication channel in the history of human civilization. Since emails are relatively inexpensive and easy to send on desktop and laptop computers, as well as on mobile phones and tablets, a staggering 280 billion emails are sent globally per *day* ([Radicati, 2017](#))—that is over a hundred trillion per year. Most emails are sent for business purposes because they are such a flexible channel ideal for short, routine information shares, requests, and responses. Emails can also convey important formal messages delivering the content that letters and memos used to handle. Emails can utilize sending a message to one person or as many people as needed. They are equally useful for integrating calendar entries for scheduling meetings and events, sending document attachments, and sending automatic replies.

The **advantages** of using email include the following: instant delivery, multiple recipients, attachments (files or links), providing a permanent electronic record of communication, use on a variety of electronic devices, and the fact that it is inexpensive. Among the **disadvantages** are the following: the illusion of privacy (emails can easily be forwarded), not being the richest communication channel in a lengthy conversation thread, the tone of the message might be misunderstood, emails may be sent too hastily or may be sent to the wrong person if an email address is misspelled, that it cannot be undone once sent, the limited attachment size of files, unsolicited emails or spam, and the requirement of some form of wireless connection.

Quantity often means diminished quality. Since so many emails are sent every day and can be composed very quickly, senders often do not pay as much attention to detail as they would to writing a formal letter, for example. This could be a costly mistake and hinder their career. Despite being a shorter form of communication, emails, just as letters or memos, represent the sender’s professional demeanor and should be written without any grammatical errors while using professional vocabulary, especially if sent in a business or employment setting.

First, the sender must ensure that writing an email is even necessary. Calling someone or walking to the

office next door to discuss something is a much richer channel of communication with instant feedback. Emails are always a great choice when retaining a written record of what has been said is beneficial. Employers and clients reading your email can be highly judgmental about the quality of your writing. The email indicates your professionalism, attention to detail, education, and even intelligence. The writing quality in a single important email can be the difference between getting hired or promoted, remaining unemployed, or even having your employment terminated.

Emails are also an important tool to gain or retain customers. In an example scenario, you get an email from a customer where they mention that they have been soliciting a company to do a custom job for them. This means they are emailing other companies with the same inquiry. Your competitors offer similar services at similar prices and are similarly reviewed positively online. With everything else being equal, the quality of the email responses may be the deciding factor. Responding to the customer quickly gives you an advantage because you demonstrate that you can get things done promptly. If your email is also well written in a professional style (see §4.5.3 for the 6 Cs) and error-free in every way due to effective editing and proofreading (see Chapter 5), your chances of getting the order from the customer are much higher.

Comparing this with another company's email that came a few days later with multiple writing errors in it, the customer will likely go with the company that wrote the better email. Even though the quality of communication does not necessarily guarantee the quality of work in the product or service a company provides, customers will assume a connection. Indeed, the quality of communication can certainly say volumes about work ethic and attention to detail. As an agent of your company, everything you do will reflect positively or negatively on your employer. That is why it is so important to safeguard all communication written on behalf of your employer. Next, we will discuss the aspects you must take care of when sending an important email in the order they appear in the email, from top to bottom.

Useful tips:

- Reply within 24 hours, or sooner if company policy requires it.
- Follow conventions for writing a clear subject line; salutation; message opening, body, and closing; closing salutation, and e-signature.
- Utilize netiquette: be as kind as you should be in person; don't write emails angrily.
- Edit to ensure coverage of the subject indicated in the subject line with no more or less information than the recipient needs to do their job.
- Proofread to ensure correct grammar, punctuation, and spelling because errors compromise your credibility.
- Avoid confusion due to vagueness that requires that the recipient respond by asking for

clarification.

Email Parts

- [8.1.1: Email Address](#)
- [8.1.2: Timestamp & Punctuality](#)
- [8.1.3: Subject Line](#)
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- [8.1.7: Attachments](#)
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8.1.1: Email Address

Just as with physical mail you pick out of your mailbox, the first thing you see when an email arrives in your inbox is who the sender is. The address determines immediately how you feel about that email and the sender who sent it. Your email address will create similar impressions on those you email depending on your relationship with them. It is therefore important that you send it from the correct email address.

If you work for a company, obviously you must use your company email address for company business. Customers expect it. Please consider that from a legal and right-to-privacy perspective, you do not own these emails. If they exist on a company server, company administrators can read any of them if they are investigating a breach of company policy or criminal activity (Federal Trade Commission, U.S. Patriot Act). This means that you must be careful not to write anything in an email that could compromise your employability.

If you are writing on your own behalf for any business or job application purposes, it is vital that you have a professional-looking email address. Using a college or university email is a good bet because it proves that you indeed are attending or attended an institution of higher education when you have made that claim in your application. If your school email address has expired, however, it is worth starting an account that has a straightforward address showing your first and last name. Of course, everybody knows that all of the straightforward *firstname.lastname@* addresses have been taken, so there's nothing wrong with variations that

include middle names or initials and small numbers as long as they don't get too long, such as more than 25 characters.

Most importantly, however, you should retire your teenage joke email address. If you have one of these, you may have scored some points with friends back in high school, but now that you are an adult, it will only do irreparable harm to your employability prospects if you are using it for job applications. Any potential employer or another professional who gets an email from *speedball.playa@hotmail.com* or *crazy.unicorn@yahoo.com* is going to delete it without even opening it.

Also, likely you will have multiple email addresses to deal with. Just as your demeanor and language style change in social, family, and professional contexts, you must likewise hold multiple email accounts—one for work, one for school, and one for personal matters. Each of the 3.8 billion email users in the world has an average of 1.7 email accounts ([Radicati, 2017](#)). It is likely that you will have more than three throughout your life and retire some of your accounts as you move on from school and various workplaces. If you can manage it, you can set up forwarding so that you can run multiple accounts out of one, except where the company or institutional policy requires that you work entirely within a designated email provider or client.

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8.1.2: Timestamp and Punctuality

The question is, how quickly are you expected to respond to emails in a professional setting? The typical business standard is to reply within 24 hours; however, in some situations, the availability of email on smartphones that almost everyone carries in their pockets has reduced that expectation to a few hours. Recent research shows that half of the email responses in business environments in fact come within two hours ([Vanderkam, 2016](#)). Some businesses have internal policies that demand even faster responses because business moves fast. If you can get someone's business sooner than the competition because you reply sooner, then you are going to make every effort to reply right away. Of course, the actual work you do can get in the way of email, but you must prioritize incoming work in order to stay in business.

What if you are unable to reply within the expected number of hours? The courteous course of action is to reply as soon as possible with a brief message stating that you will be turning your attention to this matter as soon as you can. You do not have to go into detail about what is delaying you unless it is relevant to the topic at hand, but courtesy requires that you at least give a timeline for a complete response and adhere to it.

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8.1.3: Subject Line

The next most important piece of information you see when scanning your inbox is the email's subject line. The busy professional who receives dozens of emails each day prioritizes their workload and response efforts

based largely on the content of the subject lines appearing in their inbox. Because it acts as a title for the email, the subject line should accurately summarize its topic in 3–7 words.

The minimum or maximum word count range is important because your subject line should not be so vague that it can be misleading, nor so long and detailed that its eight-plus words will be cut off by the inbox layout. Although it must be specific to the email topic, details about specific times and places, for instance, should really be in the message itself rather than in the subject line (see Table 8.1.3 below). Also, avoid using words in your subject line that might make your email look like spam. A subject line such as *Hello* or *That thing we talked about* might appear to be a hook to get you to open an email that contains a malware virus. This may prompt the recipient to delete it to be on the safe side, or their email provider may automatically send it to the junk mailbox, which people rarely check. It will be as good as gone, in any case.

Table 8.1.3: Subject Line Length

Too Short	Just Right	Too Long and Detailed
Problem	Problem with your product order	Problem with your order for an LG washer and dryer submitted on April 29 at 11:31 p.m.
Meeting	Rescheduling Nov. 6 meeting	Rescheduling our 3 p.m. November 6 meeting for 11 a.m. November 8
Parking Permits	Summer parking permit pickup	When to pick up your summer parking permits from security

Stylistically, notice that appropriately sized subject lines typically abbreviate where they can and avoid articles (the, a, an), capitalization beyond the first word (except for proper nouns; see Table 5.5.1.1), and excessive adjectives.

It is important to have a subject line even if the email is very short or appears to contain unimportant information. The word or words in the subject line will help you retrieve the email if ever needed, and it is simply polite to include one for the recipient to see.

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8.1.4: Opening and Salutation

When a reader opens your email, the opening salutation indicates not only who the message is intended for but also its level of formality. As you can see in Table 8.1.4 below, opening with *Dear [Full Name]* or *Greetings, [Full Name]*: strikes an appropriately respectful tone when writing to someone for the first time in a professional context. When greeting someone you have emailed before, *Hello, [First name]*: maintains a semi-formal tone. When you are more casually addressing a familiar colleague, a simple *Hi [First name]*, is just fine.

Notice that the punctuation includes a comma after the greeting word and a colon after the name for formal and semi-formal occasions following Comma Rule 2.1 and Colon Rule 1.2. Informal greetings, however, relax

these rules by omitting the comma after the greeting word and replacing the colon with a comma. Don't play it both ways with two commas; *Hi, Jeremy,* appears too crowded with them. After exchanging multiple emails, it is customary to leave out the salutation in subsequent emails.

Formality also dictates whether you use the recipient's first name or full name in your salutation. If you are writing to someone you know well or responding to an email where the sender used their first name at the bottom, they've given you a signal of approval to address them by their first name in your response. If you are addressing someone formally for the first time, however, you may want to use an appropriately respectful tone by using their full name. If you are addressing a group, a simple *Hello, all:* or *Hello, team:* will be proper.

When selecting and typing recipients for the email, ensure the proper spelling of their email addresses. To avoid any issues by accidentally sending an email when you were not quite ready to do so, it is recommended to fill out the *To:* section of the email only after the entire message is composed. For lengthier emails, composing the message in a Word document where a spell checker can easily be utilized is suggested. If the email is intended for one primary person but others should read it as well, include their email addresses in the CC (carbon copy) field. Be cautious about overusing this option, as not everyone on the team or in a leading position needs to see every message. They likely receive enough emails a day as is. Be selective about which messages need to be shared with whom. Another option is to Bcc (blind copy) someone, but this feature should be used very carefully. The primary recipient will typically be unaware that the message has been sent to other persons, and should they reply to all when replying to the message, the blind copy recipients will be included as well. Therefore, it is very important to consider who the secondary recipients of your message might be—in other words, to whom your message may be forwarded. When including sensitive information, a personal conversation or a phone call is a better communication channel choice than an email.

Most emails will be **direct-approach messages** where you get right to the point in the opening sentence immediately below the opening salutation. As we saw in §4.1.1 on message organization, the direct-approach pattern does the reader a favor by not burying the main point under a pile of contextual background. By stating in the opening exactly what you want the recipient to do, you increase your chances of achieving that goal.

Table 8.1.4: Direct- vs. Indirect-approach Email Openings

Sample Direct Opening	Sample Indirect Opening
We have reviewed your application and are pleased to offer you the position of retail sales manager at the East 32nd and 4th Street location of Swansong Clothing.	Thank you very much for Swansong Clothing. Thank you for your experience and qual

The **indirect approach** should mostly be avoided in emails and only sent in extenuating circumstances. It is not a proper communication channel to use email to deliver bad news or address a sensitive topic. Such difficult situations should be dealt with in person or, if the people involved are too far distant, at least by phone (see Table 2.3 and Figure 2.3 on channel selection). Other circumstances in the indirect approach that should be used for emails include the need to use persuasive techniques, evidence of a conversation in writing, or having

to contact a large number of individuals and convey negative news to them. Lastly, if there are no other means of contacting the recipient, email might be the only choice. In such cases, the indirect approach means that the opening should use buffer strategies to ease the recipient into the bad news or set the proper context for discussing the sensitive topic (see §4.1.2 for more on the indirect approach).

Otherwise, your email must pass the **first-screen test**, which stipulates that everything the recipient needs to see should be visible in the opening without forcing them to scroll further down for it. Before pressing the Send button, consider whether your message passes the first-screen test. If not, and if you have no good reason to take the indirect approach, then re-organize your email message by moving (copying, cutting, and pasting, or Ctrl + C, Ctrl + X, Ctrl + V) its main point up to make it the opening of your message.

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8.1.5: Main Parts of the Email

Emails long enough to divide into paragraphs follow the three-part message organization (outlined in §4.1) where the message body supports the opening main point with explanatory details such as background information justifying an information request. Brevity is so important in emails. Keeping the message body concise, with no more information than the recipient needs to do their job, is extremely important to the message's success. If several paragraphs are needed to convey the message, consider writing it in a separate document and attaching it to the email.

Also, keep email messages brief by discussing only one topic per email. If you have a second topic you must cover with the same recipient(s), sending a separate email about it can potentially save you time if you need to retrieve that topic content later. If the subject line does not describe the topic you're looking for because it was a second or third topic you added after the one summarized in the subject line, finding that hidden message content will probably involve opening several emails. A subject line must perfectly summarize all of an email's contents to be useful for archiving and retrieval, so one topic per email will ensure both brevity and archive retrieval efficiency.

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8.1.6: Closing

An email closing usually includes requests for action and necessary information to complete such action, including important deadlines. If your email message requests that its nine recipients each fill out a linked survey to determine a good meeting time, for instance, you would end by saying, *Please fill out the survey by 4 p.m. Friday, May 18.* If the message does not call for action details, some closing thought (e.g., *I'm happy to help. Please drop me a line if you have any questions.*) ends it without giving the impression of being rudely abrupt. Goodwill statements, such as *Thanks again for your feedback on our customer service,* are necessary, especially in emails involving gratitude.

A courteous closing to an email involves a combination of a pleasant closing word or phrase and at least your first name (in more formal messages a full name may be more appropriate). As with the opening salutation, a proper closing salutation depends on the nature of the message and how formal or informal should it be.

Table 8.1.6: Closing Salutation Examples

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

Your first email to someone in a professional context should end with a more formal closing salutation. Later emails to the same person can use the appropriate semi-formal closing salutation for the occasion. If you're on friendly, familiar terms with the person but still want to include email formalities, an informal closing salutation can bring a smile to their face. Notice in Table 8.1.8 that you capitalize only the first word in the closing salutation and add a comma at the end. The best approach is to rather be more formal than required than being informal when the recipient expects more formality when communicating with you. Especially if the professional relationship is between a manager and employee, for example, the manager should dictate when or if the level of formality should change.

Including your first name after the closing salutation ends in a friendly way, as if to say, "Let's be on a first-name basis." If you were not already, indicate to your recipient to address you by your first name in their reply. In your physical absence, your name at the end is also a stamp of authorship. Omitting it gives the impression of being abrupt and too busy or important to stop for even a second of formal niceties.

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8.1.6.1: E-signature

Not to be confused with an electronic version of your handwritten signature, the e-signature (short for email signature) that automatically appears at the very bottom of your email is like the business card you would hand to someone when networking. Every professional should have one. Like a business card, the e-signature includes all relevant contact information. At the very least, the e-signature should include the details given in Table 8.1.6.1 below.

Table 8.1.6.1: E-signature Parts

E-signature Parts	Examples
Full Name, Professional Role Company Name Company Address Phone Number(s) Company website, Email address	Jessica Day , Graphic Designer UXB Designs 492 Atwater Street Las Cruces, NM 88001 575-555-2297 (c) uxb.com jessica.day@uxb.com
Full Name, Credentials Professional Role Company Name Company Address Phone Number(s) Company website, Email address	Winston Schmidt , MBA Senior Marketing Consultant Tectonic Global Solutions Inc. 7819 Cambie Street, Hoover, AL 35022 205.555.2388 (w) 205.555.9375 (c) tectonicglobal.com m.bennington@tgs.com

Depending on the individual's situation, variations on the e-signature include putting your educational credentials after your name (e.g., MBA) on the same line and professional role on the second line, especially if it is a long one, and the company address on one line or two. Also, those working for a company usually include the company logo to the left of their e-signature. Other professionals add links to their social media profiles such as LinkedIn and the company's Facebook and Twitter pages. For some ideas on what your e-signature could look like, simply image-search "email e-signature" in your internet browser's search engine.

If you haven't already, set up your e-signature in your email provider's settings or options page. In Outlook, click on Settings, then Compose and reply, and create or edit your email signature in the space provided. Make sure that all information is correct without any typos or spelling errors. You don't want someone to point out that you've spelled your professional role incorrectly after months of it appearing in hundreds of emails.

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8.1.7: Attachments

Emails are a very useful channel choice when sending documents quickly, with certain limitations as to the size and type of files. The rules below should be followed when sending attachments in emails:

- Always announce an attachment in an email message with a very brief description of its contents. For instance, *Please find attached the minutes from today's departmental meeting* might be all you write between the opening and closing salutations.
- Never leave a message blank when attaching a document in an email to someone else. Your message should at least be like the one given above. Of course, including a message is up to you if you're sending yourself an attachment as an alternative to using a dedicated cloud storage service like Google Drive or Microsoft OneDrive. Even if it's just for yourself, however, at least including a subject line identifying the nature of the attachment will make locating the file easier months or even years later.
- Ensure that your attachment size, if it contains several megabytes (MB), is still less than your email

provider's maximum allowable limit for sending and receiving. Gmail and Yahoo, for instance, allow attachments up to 25MB, whereas Outlook/Hotmail allows only 10MB attachments. Files with gigabytes (GB) of attachments can still be shared by using email, but access must be granted to the cloud storage services where the attachment is stored. Such services are provided by Google Drive, Microsoft OneDrive, Dropbox, and many others that have varying limits from 5GB for no cost to 10TB for paid storage (Khanna, 2017).

- Always check to ensure that you've actually attached a document as part of your editing process. It shows that you lack attention to detail if your recipient responds to remind you to attach the document. If you've mentioned an attachment in your message but haven't yet actually attached it, some of the more sophisticated email providers will remind you to do this as soon as you press the Send button. If you get into the habit of relying on this feature in one of your email providers (e.g., your personal Gmail account) but are on your own in others (e.g., your work or school email provider), a false sense of security can become a disadvantage to you at some point.

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8.1.8: Final Revisions

Even if your email message is short and appears to be routine, always proofread it carefully before sending it. Nothing will damage your professional credibility more than a poorly written email with grammatical errors.

Before pressing the Send button, follow through on the entire writing process described throughout this textbook's Unit I, especially the Editing stage with its evaluation, revision, and proofreading sub-stages explored in Chapter 5. Put yourself in your reader's position and assess whether you've achieved the purpose of your email. Evaluate whether you have used the appropriate tone and formality. If you're aware that your tone is too angry, for instance, cool down by focusing on other matters for a while. When you come back to your email draft the next day, you will usually find that you don't feel as strongly about what you wrote the day before. Review the advice about netiquette in §8.2, then replace the angry words with more carefully chosen expressions to craft a more mature response before pressing the Send button. You'll feel much better about this in the end than receiving the threat-heavy response your angry email would have prompted had you gone through with sending it.

After revising generally, always proofread an email. In any professional situation, but especially in important ones related to gaining and keeping employment, any typo or error related to spelling, grammar, or punctuation can cost you dearly. A poorly written email is insulting because it effectively says to the recipient: "You weren't important enough for me to take the time to ensure that this email was properly written." Worse, poor writing can cause miscommunication if it places the burden of interpretation on the reader to figure out what the writer meant to say if that's not clear. If the recipient acts on misinterpretations, and others base their

actions on that action, you can soon find that even small errors can have damaging ripple effects that infuriate everyone involved.

Table 8.1.8: Editing a Poorly Written Information Request Email

Poorly Written Email Example	Improved Email Draft
<p>hey, think you made a mistake marking my last assinement i did what is supposed to do if its cuz i didnt get it in by the 5th its cuz i had a bad breakup it was so bad i had to see a councilor thats why i havnt bin around hope you understand. should of said that earlier maybe. oh and whens the next thing due. let me know as soon as u get this ok thanks bye</p>	<p>Hello, Professor Morgan:</p> <p>Could you please clarify why I failed the previous assignment?</p> <p>I believe I followed the instructions but may have been confused about the due date while dealing with some personal issues. If so, I apologize for my late submission and understand if that's the reason for the fail. I just wanted to confirm that that's the reason and whether there's anything I can do to make up for it.</p> <p>I assure you it won't happen again, and I'll pay closer attention to the syllabus deadlines from now on.</p> <p>Much appreciated, Taylor</p>

The poorly written draft has the look of a hastily and angrily written text. An email to a supervisor, however, calls for a much more formal, tactful, courteous, and apologetic approach. The undifferentiated wall of text that omits or botches standard email parts such as opening and closing salutations is the first sign of trouble. The lack of capitalization, poor spelling (e.g., councilor instead of counselor), run-on sentences, and lack of other punctuation such as apostrophes for contractions, as well as the inappropriate personal detail, all suggest that the writer doesn't take their studies seriously enough to deserve any favors. Besides tacking on a question at the end, one that could be easily answered by reading the syllabus, the writer is ultimately unclear about what they want; if it's an explanation for why they failed, then they must be upfront about that. The rudeness of the closing is more likely to enrage the recipient than get them to deliver the requested information.

The improved version stands a much better chance of a sympathetic response. It corrects the problems of the first draft starting with properly framing the message with expected formal email parts. It benefits from a more courteous tone in a message that frontloads a clear and polite request for information in the opening. The supporting detail in the message body and apologetic closing suggests that the student, despite their faults, is well aware of how to communicate like a professional to achieve a particular goal.

After running such a quality-assurance check on your email, your final step before sending it should involve protecting yourself against losing it to a technical glitch. Get in the habit of copying your email message text (Ctrl + A, Ctrl + C) just before hitting the Send button, then checking your Sent folder immediately to confirm that the email was sent properly. If your message vanished due to a malfunction, as can happen occasionally, immediately open a blank MS Word or Notepad document and paste the text there (Ctrl + V) to save it. That way, you don't have to waste five minutes rewriting the entire message after you solve the connectivity issues or whatever else caused the glitch.

For similar views on email best practices, see Guffey, Loewy, and Almonte (2016, pp. 90–97), which furnished some of the information given above.

Key Takeaway



Follow standard conventions for writing each part of a professional or academic email, making strategic choices about the content and level of formality appropriate for the audience and occasion.

Exercises



1. Take one of the worst emails you've ever seen. It could be from a friend, colleague, family member, professional, or other.
 - i. Copy and paste it into a blank document, but change the name of its author and don't include their real email address (protect their confidentiality).
 - ii. Use MS Word's Track Changes comment feature to identify as many organizational errors as you can.
 - iii. Again using Track Changes, correct all of the stylistic and writing errors.

2. Let's say you just graduated from your program and have been putting your name out there, applying to job postings, networking, and letting friends and colleagues know that you're on the job market. You get an out-of-the-blue email from someone named Dr. Emily Conway, the friend of a friend, who needs someone to put together some marketing brochures for her start-up medical clinic in time for a conference in a week. It's not entirely what you've been training to do, but you've done something like it for a course assignment once, and you need rent money, so you decide to accept the offer. Dr. Conway's email asks you five questions in the message body:
 - i. Our mutual friend mentioned you just graduated from college. What program? How'd you do?
 - ii. Can you send a sample of your marketing work?
 - iii. How much would you charge for designing a double-sided 8½×11" tri-fold brochure?
 - iv. When you've completed your design, would you be okay with sending me the ready-to-print PDF and original Adobe Illustrator file?

v. If I already have all the text and pictures, how soon can you do this? Can you handle the printing as well?

Dr. Conway closes her email asking if you'd like to meet to discuss the opportunity in more detail and signs off as Emily. Draft a formal response email that abides by the conventions of a formal email.

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8.2: Netiquette and Social Media

Section 8.2 Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
3. Select and use common, basic information technology tools to support communication.
4. Discuss emerging netiquette standards in social media used for professional purposes.

We create and curate personal profiles, post content and comments, and interact via social media as a normal part of both our personal and professional lives. How we conduct ourselves on the open internet can leave a lasting impression, one not so easily undone if it's regrettable. The hilarious but compromising selfie you posted on Instagram five years ago is still there for your potential employer to find, judging for what it says about your professionalism and speculating about what customers might think if they saw it too. That sarcastic but not-so-PC reply to a public post on Facebook or Twitter in a heated moment a decade ago can come back to haunt you. We're all learning as we go in this new media environment, but any mistakes we make along the way, no matter how much we've matured since, are still there for all to see and can have lasting impacts on our careers. Many candidates for political office have been taken down by their past social media posts and the agents tasked with digging them up ([Harris, 2015](#)), and you can be sure that untold numbers of job applicants have met with a similar fate. Some guidance about what can be done about those mistakes, as well as how to conduct yourself properly moving forward, can help improve your employability ([adapted from *Business Communication for Success*, 2015, 9.1](#)).

- [8.2.1: Shea's Netiquette](#)
- [8.2.2: Legal Considerations](#)

- [8.2.3: Using Social Media Professionally](#)
- [8.2.4: The Dark Side of Technology](#)

8.2.1: Shea's Netiquette

Virginia Shea's Rules of Netiquette

- Remember the human on the other side of the electronic communication.
- Adhere to the same standards of behavior online that you follow in real life.
- Know where you are in cyberspace.
- Respect other people's time and bandwidth.
- Make yourself look good online.
- Share expert knowledge.
- Keep flame wars under control.
- Respect other people's privacy.
- Don't abuse your power.
- Be forgiving of other people's mistakes. (Shea, 1994)

Her rules speak for themselves and remind us that the golden rule (treat others as you would like to be treated) is relevant wherever there is human interaction ([Business Communication for Success, 2015, 9.1](#)).

8.2.2: Legal Considerations

Your writing in a business context means that you represent yourself and your company. What you write and how you write it can be part of your company's success but can also expose it to unintended consequences and legal responsibility. When you write, keep in mind that your words dispersed electronically have become a part of a permanent online repository and can be retrieved at any time. They can become an issue if they exaggerate, state false claims, or defame a person or legal entity such as a competing company. Another issue is plagiarism, using someone else's writing without giving credit to the source. Whether the "cribbed" material is taken from a printed book, a website, or a blog, plagiarism is a violation of copyright law and may also violate your company policies. Industry standards often have legal aspects that must be respected and cannot be ignored. Always check with a supervisor or legal counsel at your company if unsure about the legal consequences of your written communication.

The rapid pace of technology means that the law cannot always stay current with the realities of business communication. Computers had been in use for a couple of decades before the [Copyright Act of 1976 was amended by adding the Consolidated Appropriations Act of 2021 that added section 2319C to Title 18,](#)

[United States Code, regarding criminal penalties for copyright infringement, and a new chapter 15 to Title 17, the Copyright Alternative in Small-Claims Enforcement \(CASE\) Act of 2020.](#)

For example, suppose your supervisor asks you to use your Facebook page or Twitter account to give an occasional “plug” to your company’s products. Are you obligated to comply? If you later change jobs, who owns your posts or tweets—are they yours, or does your now-former-employer have a right to them? What about your network of “friends”? Can your employer use their contact information to send marketing messages? These and many other questions remain to be answered as technology, industry practices, and legislation evolve (Tahmincioglu, 2009).

Our product is better than X company’s product. Their product is dangerous and you would be a wise customer to choose us for your product solutions.

What’s wrong with the two sentences above? They may land you and your company in court. You made a generalized claim of one product being better than another, and you stated it as if it were a fact. The next sentence claims that your competitor’s product is dangerous. Even if this is true, your ability to prove your claim beyond a reasonable doubt may be limited. Your claim is stated as fact again, and from the other company’s perspective, your sentences may be considered libel or defamation.

Libel is the written form of defamation or a false statement that can damage a reputation. If a false statement of fact that concerns and harms the person defamed are published—including publication in a digital or online environment—the author of that statement may be sued for libel. If the person defamed is a public figure, they must prove malice or the intention to do harm, but if the victim is a private person, libel applies even if the offense cannot be proven to be malicious. Based on the First Amendment to the U.S. Constitution, you have the right to express your opinion, but the words you use and how you use them, including the context, are relevant to their interpretation as opinion versus fact. Always be careful to qualify what you write and to do no harm ([Business Communication for Success](#), 2015, 4.5).

Bear in mind that, concerning email security, no matter whom you select as the primary or secondary (CC’d) recipients of your email, always assume that it may be forwarded on to other people, including those you might not want to see it. Just because you’ve selected recipients doesn’t necessarily make your email a private channel. You have no control over whether the recipients forward it on to others, what the server administrators do with it (legally or not), or if your account or the server is hacked. If your email contains any legally sensitive content, it can even be retrieved from the server storing it with a warrant from law enforcement. A good rule of thumb is to never send an email that you would be embarrassed by if it were read by your boss, your family, or a jury. No technical barriers prevent it from falling into their hands.

8.2.3: Using Social Media Professionally

When asked, students readily share their daily participation in writing Amazon reviews and posting to social media sites, such as Instagram, TikTok, Snapchat, Facebook, or Twitter. With the widespread use of smartphones, the frequency of use of social media skyrocketed. Such widespread use of social media certainly

got the attention of businesses because there is a high potential for profits in marketing products on these venues. Using social media for business requires a lot more attention to detail and opens a door to a greater potential of legal liability.

First, recognize that every modern business or organization should have a social media presence on the sites they expect their customer base to frequent, especially popular sites such as [Twitter](#), [Facebook](#), and [Instagram](#). Messaging here must be consistent across the platforms when alerting the customer base of important information such as special events, deals, and other news.

Next, follow expert advice on how to properly take advantage of social media in detail to promote your operation and reach people. Large companies will dedicate personnel to running their social media presence, but small businesses can do much of it themselves if they follow some decent online advice, such as the following pages:

- [The Do's and Don'ts of How to Use Facebook for Business \[Infographic\]](#) (Mineo, 2017)
- [The Ultimate Guide to Twitter for Small Business in 2017](#) (Jackson, 2016)
- [How to Use Instagram for Business: A Complete Guide for Marketers](#) (Dawley, 2018)

Enterprise social networking has its downside as well. Unhappy customers can voice their concerns for the entire world to see. Businesses must therefore have a plan for damage control of their reputation, whether customer comments are truthful or not. With the advent of the COVID pandemic, platforms similar to social media sites can be placed on a company's intranet website, providing consistent updates to the information and connecting employees who may be working from home.

Always consider how the sites you access and what you post represent you and your employer, even if you think others don't know where you work or who you are. As an agent of your corporation, everything you do or say can and will reflect on your employer, even if you are engaging in such activities in your free time or using your privately owned device. Internet service providers (ISPs) are required by law to archive information concerning the use and traffic of information that can become available under subpoena. Any move you make leaves digital footprints, so you will have to answer for any misstep that brings shame upon you or your company (Business Communication for Success, 2015, 19.4).

From a company's perspective, it is advisable to have a plan on how to mitigate any possible damage caused by inappropriate social media usage by employees or negative comments from customers. You should have a clear plan as to what steps you will need to take. You can incorporate these response scenarios into the company's risk management plan. Similarly, your customer representatives should have a flowchart available outlining how to respond to negative customer feedback. It is always better to have a clear company policy available to employees so that they know what is expected of them in such situations.

8.2.4: The Dark Side of Technology

The internet in general and social media sites in particular can be a wonderful business tool but they can create potential problems as well. Businesses must be mindful of the possibility of a data breach, hackers, or phishing attacks and must safeguard sensitive client information. With artificial intelligence, holograms, facial recognition, and the metaverse on the horizon, businesses and customers alike will have to face novel challenges to their data privacy and security online. Information gathered from online sources may not always be reliable, which is why students and employees alike should always check the source of information before presenting it as a fact. On the other hand, employers should be aware that images and videos can be easily altered and not to create a negative image of a potential or current employee too hastily before verifying the details.

Key Takeaway



Whether in the public or private corners of the internet, conduct yourself online in a manner that is always conducive to your professional success, following established netiquette principles, as well as using social media effectively and responsibly.

Exercises



1. Recount how you have experienced a breach of netiquette such as online bullying. Were you a perpetrator, enabler, victim, or combination? What did you learn from it?
2. Identify and explain three ways that you can professionalize your online presence using social media.

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8.3: Text Messages and Instant Messages

Section 8.3 Learning Objectives



1. Plan, write, revise, and edit short documents and messages that are organized, complete, and tailored to specific audiences.
3. Select and use common, basic information technology tools to support communication.
4. Discuss emerging netiquette standards in social media used for professional purposes.
5. Use rapid electronic communication channels such as texting and instant messaging in a professional manner.

On any digital device you use, written communication in the form of Short Message Service (SMS), or texting, has been a convenient and popular way to connect since the 1990s. Instant messaging (IMing) apps such as Snapchat, WhatsApp, and Facebook Messenger have increased the options people have to send and respond to brief written messages in real time when talking on the phone would otherwise be inconvenient. In business, texting and IMing are especially advantageous for discussing details precisely in writing so that they can

be referred to later. Texting and IMing are not useful for long or complicated messages but are great for connecting while on the go. However, consider your audience and company by choosing words, terms, or abbreviations that will deliver your message most effectively using these communication tools.

Tips for Effective Business Texting:

- Know your recipient; “? % dsc” may be an understandable way to ask a close associate what the proper discount is to offer a certain customer, but if you are texting or IMing your boss, it might be wiser to write, “*What % discount does Murray get on \$1K order?*”
- Anticipate unintentional misinterpretation. Texting often uses symbols and codes to represent thoughts, ideas, and emotions. Given the complexity of communication, and the useful but limited tool of texting, be aware of its limitation and prevent misinterpretation of brief messages.
- Contacting someone too frequently can border on harassment. Texting is a tool. Use it when appropriate, but don’t abuse it.
- Unplug yourself once in a while. Do you feel constantly connected? Do you feel lost or “out of it” if you don’t have your cell phone and cannot connect to people, even for fifteen minutes? Sometimes being unavailable for a time can be healthy—everything in moderation, including texting.
- Don’t text and drive. Research shows that the likelihood of an accident increases dramatically if the driver is texting behind the wheel (Houston Chronicle, 2009). Being in an accident while conducting company business would reflect poorly on your judgment as well as on your employer ([Business Communication for Success, 2015, 9.1](#)).

8.3.1: Enterprise Messaging

In this section, we will discuss a few enterprise messaging systems that are commonly used in business. First, Microsoft’s 365 Business Basic enables participants to chat, call, and conduct virtual meetings with up to 300 attendees. It also includes web and mobile versions of the Microsoft Office application, 1 TB of cloud storage, business-class email, and increased web support.

Google’s Workspace (formerly called G Suite), for a monthly fee, provides access to Gmail email accounts to the entire company in the form of [name@company.com](#). With the included Admin feature, administrators can manage user accounts and obtain more storage on Google Drive. It also includes a chat space and virtual meeting rooms to conduct video meetings for individuals or teams.

Another platform, Slack, also used for Customer Relationship Management, has been acquired by Salesforce. This merger created a new product, Slack-first Customer 360, which is a virtual space to connect employees with customers and incorporates applications that they use every day (“[Salesforce Completes Acquisition of Slack](#),” 2021).

Key Takeaway



Professionalize your use of rapid electronic communication such as texting and instant messaging so that you can assume a competitive advantage throughout your careers.

Exercises



1. Write out your answers to the following questions:

- i. How old were you when you got your first mobile phone?
- ii. When did you send your first text?
- iii. How many texts do you send per day, on average, now?

iv. How many times do you speak on the phone with the same device, on average, throughout your day? If you call (or receive calls) far less than text, why do you think that is?

v. Is the first thing you look at when you wake up in the morning your smartphone notifications, and are they the last thing you look at before you go to sleep at night? If so, why? If not, why do you think it is for so many people?

vi. Do you think it's fair to say that your smartphone use can be characterized as an addiction? If so, how is it impeding you from living a more healthy and fulfilling life? Is there anything you are prepared to do about it? If not, do you see it as a problem for people around you? Do you challenge them on it? Do you find it a challenge to discipline yourself to prevent it from being an addiction in your case?

2. Identify three ways that you must change your texting and IM behavior in professional—rather than purely social—contexts.

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Test Your Understanding

Activity: Correct Philip's Email



An interactive H5P element has been excluded from this version of the text. You can view it online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=567#h5p-16>

Activity: Identify Terms



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Activity: Email Self-Assessment



An interactive H5P element has been excluded from this version of the text. You can view it online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=567#h5p-15>

Activity: Netiquette



An interactive H5P element has been excluded from this version of the text. You can view it online here:
<https://louis.pressbooks.pub/businessprofessionalcomm/?p=567#h5p-18>

Activity: Self-Introduction Email



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<https://louis.pressbooks.pub/businessprofessionalcomm/?p=567#h5p-19>

Activity: Find the Errors



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Activity: Put the Memo in Order



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Activity: Letter—Subject Line



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Activity: Letter—Opening



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Activity: Letter—Revision



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Activity: Letter—Updated



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CHAPTER 9: JOB SEARCH, RÉSUMÉS, AND COVER LETTERS

Adrienne Abel

Chapter Learning Objectives

1. Analyze skills, knowledge and abilities in regard to employment purposes.
2. Identify and assess individual skills and strengths for career and individual employment goals.
3. Prepare targeted and persuasive employment documents.

Your time within your academic program is coming to an end. Now is the time to apply your hard work and training in finding employment in your desired area, using a skill set that is different from the courses you were taught. However, you must rely on this skill set to get the job that you want. In many professions, the intensity of the job competition is fierce, so your communication skills will assist you throughout the hiring process.

This chapter will discuss how to complete a job search using various methods and resources and completing a written component consisting of a cover letter and résumé that showcases your skills.

- [9.1: Job Search Techniques](#)
- [9.2: Creating and Completing Successful Résumés and Employment Applications](#)
- [9.3: Crafting a Winning Cover Letter](#)
- [9.4: Examples of Résumés, Cover Letters, Styles of Letters](#)

9.1: Job Search Techniques

Section 9.1 Learning Objectives



1. Represent skills, knowledge, and experience realistically for employment purposes.
2. Identify and assess individual skills, strengths, and experiences to identify career and professional development goals.

Access the following link for a video regarding job search strategies:



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Job Search Topics

- [9.1.1: Strengthening Your Skills and Qualifications](#)
- [9.1.2: Job Availability and How to Locate Them](#)

9.1.1: Strengthening Your Skills and Qualifications

Your job search should begin with a self-analysis. List the skills and qualifications that would make you hireable. If you are having difficulty with this task, take a look at your current program learning outcomes, which gives a description of skills and knowledge that a student must possess to successfully pass the course. All of the items listed cannot be included on a résumé; however, you can tailor your job search to those skills that you consider your strengths.

In addition to program-specific skills, you can also add a range of other skills. Get started by asking yourself the following questions:

- What is my passion and can I develop the passion into a career?
- Do I work well with people, data, or things?
- Am I better with following directions or giving them?

- Am I willing to work in only a specific area or is relocation an option?
- How comfortable am I with using technology?
- Do I enjoy working alone or within a team or both?
- Can I adapt to changes quickly?
- Can I see myself as a leader?
- What type of supervisor or manager would I like to work with?

Have you considered conducting an interview with someone who is working in your desired field? By conducting an interview, you can acquire firsthand knowledge of the business or industry, work conditions, what a typical day consists of, and the expectations of the job.

[Return to the Job Search Topics menu](#)

9.1.2: Job Availability and How to Locate Them

You have narrowed your list of the skills and abilities that you possess, but what is your next step? Have you thought about where to search for available jobs? Here is a list of options:

Word of mouth: This is an easy way to search for employment. Engage in conversations with individuals who work in your desired career field, letting them know that you are looking for employment. Although you may not achieve immediate results, those individuals may “pass the word” to others who are seeking new employees. Having a frank conversation with friends and family about your job quest could yield great leads.

Newspapers: You’re probably thinking that this is an obsolete practice; however, your local newspaper still posts “Help Wanted” advertisements. Traditionally, the Wednesday and Sunday editions carry the most job advertisements. Try to find one that suits your employment needs.

Job fairs: Nearly every community college or university hosts a job fair at least once per academic year. You can find a variety of businesses and industries located in one space that are in the market for part-time and full-time employees. If you decide to attend a job fair, ensure that you are dressed professionally with several copies of your résumé. Ask questions regarding open positions and what is expected of an employee.

Online search: Conducting an online search is a faster way to identify many job opportunities at once. You can search for your desired career field by various criteria such as geographic location, education, skills, etc. Interested individuals are also prompted to upload their résumé for instant matches in their field and can explore helpful information regarding job searches. Below are a few job posting websites:

- [Monster](#)
- [Indeed](#)
- [CareerBuilder](#)
- [Glassdoor](#)
- [Wowjobs](#)

- [Louisiana Civil Services Jobs](#)
- [Louisiana Workforce Commission](#)
- [USA Jobs](#)

It should be noted that you should never have to pay to conduct a search or post a résumé. For safety reasons, be careful not to share your personal information such as your home address. Instead, conduct your searches by using your state or region.

A search for a job in a particular field or career of interest can prove disappointing at the beginning of your search if you only explore one of the above sites. It would be beneficial to utilize all sites to seek information in your desired field and then compare your results. Additionally, you can maximize your results by including specific keywords related to your career area of choice. You want to gather as many job leads as possible in order to make a decision on which job openings you would like to apply for.

Now that you have completed your job search, you should prepare your résumé and cover letter. These items are important pieces of your employment process.

[Return to the Job Search Topics menu](#)

Key Takeaway



Preparing a winning cover letter and résumé begins with assessing your skills and researching what employers are looking for, what jobs are available, and how to find and apply to them.

Exercise



Use several of the job search engines listed in [§9.1.2](#) above to collect about half a dozen job postings that you would be interested in applying to if they were available upon graduation. If you can't find any in your local region, look further afield in neighboring cities or even other provinces or countries you'd be interested in moving to. Compare the various postings. Identify common terms used in the lists of required skills and job duties. What are the common work experience and educational qualifications identified as required or as assets?

9.2: Creating and Completing Successful Résumés and Employment Applications

Section 9.2 Learning Objective



1. Represent skills, knowledge, and experience realistically for employment purposes.

Résumé Topics

- [9.2.1: Purpose of a Résumé](#)
- [9.2.2: Purpose of an Employment Application](#)
- [9.2.3: Selecting a Résumé Style](#)
- [9.2.4: Building Your Résumé](#)
- [9.2.5: Résumé Formatting](#)

9.2.1: Purpose of a Résumé

A résumé is the central document of your job application because it's what employers focus on most when judging an applicant's suitability for doing the job they're hiring for. Does the candidate have the right combination of core and soft skills to do that job? Did they acquire those skills with the right combination of education, employment, and other experience? Are they able to put a document together in a clear, concise, correct, organized, and reader-friendly way? Unable to appear in person to make the pitch at this point, the applicant's résumé conveniently answers these questions. It's convenient because (1) it proves the applicant's writing ability and (2) interviewing every applicant in person about their skills would be logistically impossible. The goal of the résumé, then, is to convince the employer to include you in the small selection of candidates they will interview to find the right person for the job.

Your résumé should be well-prepared so that it sets you apart from other candidates. We'll discuss the various types of résumés in Section 9.2.3.

- [Return to the Résumé Topics menu](#)

9.2.2: Purpose of an Employment Application

An employment application is similar to a résumé; however, the application delves a little deeper. This application could be used as a pre-screening method for companies and also as another way to obtain an interview. Information not included in your résumé may be asked with the application, such as desired salary, current employment status, if you have ever terminated from a job, relevant experience, etc. Employment applications may be issued in person or online.

- [Return to the Résumé Topics menu](#)

9.2.3: Selecting a Résumé Style

Imagine that you are auditioning for a part in a popular movie. In your audition, you give it your best shot—hitting all of your marks and delivering an awesome performance. Think of your résumé as your audition—for employment. You should select the type of résumé that would best fit the job that you are seeking. We will explore three types of résumés: chronological, functional, and video.

The most common or preferred résumé type is a chronological résumé. This type of résumé is completed by showing one's work experience, starting with the most recent experience listed first. A chronological résumé also focuses on education and experience and shows an applicant's growth and progress through their professional lives. Please see Section 9.4.1 as an example.

A functional résumé focuses on skills and accomplishments instead of employment. This type of résumé is designed for those individuals who have had gaps in employment, those who are seeking full-time employment, or those returning to work after an absence. Functional résumés contain the same information as a chronological résumé, only in a different order. Please see Section 9.4.2 as an example.

As technology changes, so does the way that companies are acquiring information regarding new hires. Video résumés are a part of that future and are a great way for potential employers to see and hear you within your own environment. For this type of résumé, you would basically speak about the items listed on your résumé, detailing your work experience, skills, and abilities. This also gives the potential employer a look into your communication skills.

The video below explores structuring a video resume:



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- [Return to the Résumé Topics menu](#)

9.2.4: Building Your Résumé

Regardless of which type of résumé you decide to submit for job consideration, you will need to include pertinent information and categorize particular sections. The length of your résumé is important. As a general rule, when you include your experience, you should limit it to fewer than 10 years. However, if you have more than 10 years experience, a 2- to 3-page résumé is acceptable.

Your information should be included in the following areas for a successful résumé:

Main heading: Your name, email address and contact phone number. If necessary, create a separate email address that you will use only for your job interests.

Career objective: Mentioning the company and the position that you are applying for within this area shows the employer that you have a direct interest in the position.

Work experience: Within this area, you should begin with your most recent employment and list your job title, company name, city and state, the year you were hired, and the year when your employment ended. Three to four job duties should be listed. This presents a detailed look at the skills you presented during that time period.

The use of action words is imperative, as well as the verb's tense when describing your job duties. Using high-impact words can yield great results when detailing your work. Below is a list of some of the action words (Guffey, Loewy, & Almonte, 2016, p. 387) used in résumés:

Achieved	Directed
Analyzed	Established
Approved	Facilitated
Conducted	Implemented
Contributed	Improved

Education: Beginning with your current educational status, list the complete name of your educational institution, the year you began/ended attendance at this institution, as well as the program/curriculum you are studying.

Skills/certifications: List any particular skills you may have, especially if these are skills related to the job you are applying for. When you list your certifications, list the complete name, along with the date the certificate was obtained.

Memberships: If you are a member of any school or civic organizations, you should list them here, along with the year(s) and any leadership positions held.

Awards or honors: List these, beginning with the most recent award/honor received.

References: This is a debatable section. Depending on the instructions given within the job notice, you may have to list several individuals as references. Your references cannot be a spouse, significant other, parent or

grandparent, sibling or friend. Instead, seek a reference from a current or former supervisor, civic organization leader, current or former instructor, clergyman (priest, pastor, reverend, rabbi, etc.), etc. If the company does not require that you include references, simply state “Available upon request.”

The following *should not* be included on a résumé:

- Your social security number
- Your ethnicity
- Your marital status
- Your GPA
- Number of children you have
- Your sexual orientation

Please watch the video below, which discusses tips on how to write a standout résumé:



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9.2.5: Résumé Formatting

You’re doing great! You have all of your content in their respective categories. Organize your categories according to what type of résumé you need to submit. Make sure that you conduct a thorough spelling and grammar check. It may help you to print a copy of the résumé and have someone else review it. By completing this step, you can view items that you may need to rearrange, omit, and/or include.

A résumé, regardless of type, should be legible. The text used should be a standard 11- or 12-point font, which is an easy to read font size. Eliminate additional white space if possible. The résumé should flow smoothly with the absence of chunks of white space.

If the employer requires an electronic submission, follow their directions exactly. If they ask for a PDF or MS Word file named a certain way (e.g., Resume_Yourlastname_Yourfirstname.docx or .pdf), doing it any other way will disqualify you immediately. (The reason is obviously that if you can’t follow simple instructions for submitting your résumé, you’ll have problems taking direction in the workplace—problems that can potentially be expensive to the employer.) If you have a choice between MS Word or PDF, choose PDF because it embeds fonts and formats, so you can be reasonably sure that you’ll avoid issues with font conversion or format scrambling when your document is opened on another computer.

If the employer uses a job search site such as Indeed, beware that your résumé formatting will be stripped

out by their scannable résumé converter. Avoid the nightmare scenario of the employer seeing your résumé massacred by the converter and thinking it's your fault (Terrible Resume Converter, n.d.) by doing the following:

1. Produce a version of your résumé that uses no formatting whatsoever—no bullet points, no tabbing, no columns, no bold typeface, no color, no changes in font size, etc. If the converter can't do this properly for you, doing it manually yourself will ensure that the employer sees a readable version.
2. Use Indeed (or other search engines) to find job postings, but send your well-formatted application directly to the company via either email or traditional mail.

Try these approaches in combination to ensure the employer gets your application. If the employer uses an online application form, having the simplified version recommended in #1 above ready to copy and paste into the given fields will make your work much easier. This is especially necessary if the form will time out to prevent applicants writing from scratch as they go. Don't forget: when employers use these electronic filtering methods, it's for no other reason than to have the program scan the résumés and filter out the generic spam applications that fail to meet a given quota of the job posting's key terms. The program sends along only the targeted résumés to the hiring manager, so ensure that your résumé content features those key terms and doesn't crowd them out with much else.

If the employer requires a hard-copy submission, it may be worth going to an office supply store to invest in some high-quality paper and printing. When the employer sees stacks of applications printed on standard paper stock, one printed on quality paper really stands out. High-quality printing also shows respect, suggesting that the employer was worth the extra expense. Also, put an 8.5" × 11" cardboard backing in with your application when you mail it in a 9" × 11.5" envelope to ensure that it won't be creased in transit. High-quality writing and convincing content printed on pristine, high-quality paper are a winning combination in the eyes of any hiring manager exhausted by the disappointing quality of the majority of applications.

Please see Sections [2.4.1](#) and [2.4.2](#) for examples of acceptable and unacceptable résumés.

Key Takeaway



Targeted résumés *perfect* in the quality of their content, organization, writing, and overall presentation increase your chances of getting interviews and hence the jobs you apply to.

Exercise



Compare the advice given on targeted résumés throughout this section to those in the alternative resources linked a few lines above. You can also find dozens more guides on how to write a résumé online, so include any of them in your comparison. Between all of these, you'll see differences in opinion regarding matters of formatting, style, and other minutiae. Identify those differences and provide reasons for going with the advice of this or any other guide for each part of the résumé you intend to write.

Test Your Understanding



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9.3: Crafting a Winning Cover Letter

Section 9.3 Learning Objective



1. Represent skills, knowledge, and experience realistically for employment purposes.

Cover Letter Topics

- [9.3.1: Purpose of a Cover Letter](#)
- [9.3.2: Formatting a Cover Letter](#)
- [9.3.3: Ensuring That Your Cover Letter Stands Out](#)

9.3.1: Purpose of a Cover Letter

The cover letter's purpose is to serve as the key role of seeking an interview. While the résumé focuses on past work history, the cover letter sets its sights on the future. In this document, you are targeting your qualifications, showcasing your written communication skills, and lastly, asking for an interview. Your overall job is to inform your potential employer of the extra details that you can bring into the desired position.

9.3.2: Formatting a Cover Letter

Should you format the cover letter in the personal modified-block style or standard block style? These two styles differ first in how they present the sender's address. The personal modified-block letter simply has the sender's two address lines at the top but tabbed so that their left edges line up along the vertical center of the page. At the bottom, the signature block's left edge also lines up with the vertical middle of the page. The modified-block-style format is acceptable if you're required to submit your cover letter as a separate file in electronic submissions. Even better, however, would be if you did a block-style letter with a formal letterhead much like companies have—only your name is the company—in the header and used it consistently across your cover letter and résumé. If you've put a personal letterhead in the header of your résumé and can add your cover letter to your résumé file by making it the first page, then the letterhead appears automatically at the top. If so, then adding your address below the letterhead is unnecessary. From there, you would simply follow the format of a block-style letter. Keep it down to one page so you don't exhaust the busy reader's patience, unless, of course, you know for sure that they want more detail on a second page.

For additional tips on cover letters, see Section 9.4.3.

For additional tips on letter formats, see Section 9.4.4.

- [Return to the Cover Letter Topics menu](#)

9.3.3: Ensuring That Your Cover Letter Stands Out

Follow these steps for a winning cover letter!

List your contact details: Include your name, phone number, email address, and your online contact information, such as LinkedIn.

Date and potential employer's address: You should always include the current date. The potential employer's contact information should be listed completely, including the full name and mailing address.

A salutation is required: A proper greeting shows respect.

Introduce yourself: Your first paragraph should be your introduction to the company. Grab the company's attention by stating the position you are applying for, the source of the job advertisement, and your strong desire for the position.

In a new paragraph, expand on your experience: In this paragraph, give the potential employer a glimpse of your skills, knowledge, and abilities. Capitalize on your unique skill set—this will set you apart from other candidates.

In the last paragraph, finish strong: In this paragraph, thank the potential employer for reviewing your cover letter. State that you would like to further discuss your skills within an interview setting and include your contact information.

Your signature is important: End the cover letter with “Sincerely” and your signature.

Your final task will consist of completing a spelling and grammar check of your cover letter. It is also a good idea to print a copy and read it over again. Checking for any inaccuracies, unbalanced paragraphs, or formatting issues is crucial for an effective cover letter.

- [Return to the Cover Letter Topics menu](#)

Key Takeaway



Write a cover letter as part of your targeted approach to applying for job

competitions you really want to win; use it to identify the job by name, introduce your résumé, explain how you'll apply your skills in the job at hand, and request an interview.

Exercise



Write an unsolicited cover letter for your dream job. Take the indirect approach and be convincing in how you present your pitch.

9.4: Examples: Résumés, Cover Letters, Styles of Letters

- [9.4.1: Acceptable Résumé—Juan Castillo](#)
- [9.4.2: Unacceptable Résumé—Allison Green](#)
- [9.4.3: Tips for Creating a Great Cover Letter](#)
- [9.4.4: Letter Formats: Block, Modified Block, and Semi-block](#)

9.4.1: Acceptable Résumé—Juan Castillo

Juan Castillo

(337)-555-3535

juancastillo@yahoo.com

Objective To obtain a position as a Welder’s Helper

Experience Coushatta Casino Resort, Kinder, LA Valet, January 2021-Present

- Greet incoming and departing customers
- Park and retrieve customer vehicles
- Inspect vehicles for any damage
- Issue ticket stubs
- Place corresponding tags with customer vehicles

Education SOWELA Technical Community College—Oakdale, LA

August 2020 - Present

Enrolled in Welding program

Oberlin High School, May 2020

Obtained high school diploma

Memberships SOWELA – Student Government Association, 2020-Present

SkillsUSA, 2020 - Present

Skills OSHA Certification (10-hour course through SkillsUSA), 2021

Shielded Metal Arc Welding

Tungsten inert Gas Welding

Flux Core Arc Welding

Metal Inert Gas Welding

Groove Welds, Fillet Welds and Pipe Welds

Flat, Vertical, Horizontal, Overhead, 5G, 2G and 6G

References Available upon request

9.4.2: Unacceptable Résumé—Allison Green

ALLISON GREEN
 337.782.6623
 allisongreen1@gmail.com



OBJECTIVE

I am a highly motivated individual driven to excel in my professional career. I want a job making more money than I am making now.



EDUCATION

Business Administration (Undergraduate) | Baton Rouge Community College
 MAY 2021



EXPERIENCE

Event Decorator / Sales Associate | The Personal Touch Wedding and Design
 JUNE 2019 – JULY 2020

Some duties included: Managing Inventory, Transportation, set up & take down at events, maintain customer satisfaction, serving food to guest, Sales, Cash handling, social media promoting, and creating custom items.

Store Manger Dollar General

AUGUST 2017 – MAY 2019

I started off as a part time sales associate with no prior retail experience. I worked my way to a store manager position!

Job duties included: I opened and closed the store with store responsibilities, scheduling, staffing, training, record keeping, working with vendors, sales / meeting projected sale goals, customer service, stocking & receiving of goods, inventory, cash handling, and much more. I hired and fired a lot of people.



MEMBERSHIPS

2019 – 2021; Student Government Association (BRCC President, 2020-2021)



REFERENCES

Available upon request

9.4.3: Tips for Creating a Great Cover Letter



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9.4.4: Letter Formats: Block, Modified block, and Semi-block

[Letter Formats: Block, Modified Block... | Lexico.com](#)

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CHAPTER 10: INTERPERSONAL WORKPLACE COMMUNICATION

Adrienne Abel

Chapter Learning Objectives

1. Define professional behavior according to employer, customer, coworker, and other stakeholder expectations.
2. Explain the importance of ethics as part of the persuasion process.
3. Define and provide examples of sexual harassment in the workplace, as well as strategies for how to eliminate it.
4. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
5. Explain how to use your voice effectively in professional situations.
6. Identify the five stages of a conversation and general strategies for improving conversation skills.
7. Communicate effectively by telephone in a professional manner.
8. Identify successful strategies for job interview preparation.
9. Explain how best to answer standard and behavioral job interview questions.

Until this point, we have focused mostly on crafting writing skills pertaining to the workplace. Despite all the sophistication of our skills with the written language and writing technologies, they are all extensions of a natural technology that we can't do without. Just as a wheel improves upon what our feet do and a hammer upon our fists without replacing them, our writing technologies don't replace our voice. Indeed, they make the uses to which we put our voices all the more important. When you look at the job application process, for instance, the written component (résumé and cover letter) will get you in the door, but it's the in-person, face-to-face conversation you have for the oral component (the interview) that will ultimately get you the job.

In a world gone mad for technology, we still value the human element of our face-to-face interactions

most. Though online shopping has stolen some of the retail market shares from brick-and-mortar stores, the vast majority of business interactions require in-person contact—not just at the customer-to-business front end but especially in the back end of internal office operations. The advantages of in-person workplace collaboration will protect those face-to-face interactions for a long time to come, as well as require that everyone in the workforce have high-level communication skills. This chapter focuses on the aspect of the needed soft skills for effective communication and how to prepare for a job interview.

Access the video below relating to verbal communication in the workplace:



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=611#oembed-1>

- [10.1: Verbal Communication and Conversation](#)
- [10.2: Ethics and Professionalism](#)
- [10.3: Effectively Answering Interviews Questions](#)
- [10.4: Examples and References](#)

10.1: Verbal Communication and Conversation

Section 10.1 Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
2. Explain how to use your voice effectively in professional situations.
3. Identify the five stages of a conversation and general strategies for improving conversation skills.
4. Communicate effectively by telephone in a professional manner.

Your professional success depends on having advanced people (a.k.a. “soft”) skills because most jobs require you to talk to people. Key among these is a skill in speaking and conversing with others in person. Retail sales, for instance, requires the ability to listen carefully to what a customer says they want and “read” their nonverbal cues to determine what exactly to say and how to say it in order to close the deal with a purchase. Though we’re

not born with them, everyone has the capacity to learn, develop, practice, and apply verbal and nonverbal skills to benefit audiences, their company as a whole, and themselves.

Throughout your life, you have had many conversations, yet you may have never thought about the process of cultivating a conversation. Starting a conversation may seem easy for some, while others are not comfortable in that element. Starting a conversation is further hindered by emerging technology, which has played a huge part in how our daily conversations have changed. Therefore, it's worth breaking down how an effective communicator approaches the art of conversation. A skilled professional knows when to speak, when to go silent and listen, as well as when to stop speaking before the audience stops listening. Additionally, understanding the conversation process will provide a foundation for approaching communication relating to job interviews.

Verbal Communication and Conversation Topics

- [10.1.1: Using Your Voice as Your Most Essential Communication Tool](#)
- [10.1.2: Exploring the Five Parts of a Conversation](#)
- [10.1.3: Conversation in the Digital Age](#)
- [10.1.4: Using the Telephone and Voicemail Effectively](#)

10.1.1: Using Your Voice as Your Most Essential Communication Tool

Verbal communication is the process of using words to convey a message. Not all messages can be relayed in a written form, so a verbal conversation has to take place. Your message, regardless of the form, includes a sender, a receiver, and a message. Your communication is deemed successful if the message of the speaker has been heard and understood.

Did you know that the tone of your voice can play a part in how a message is received? Imagine that you and a group of your friends have been summoned to the school auditorium for a general assembly. The gathering is large, with multiple conversations going on at once at various levels. In order to gain the attention of the crowd, the speaker has to raise the tone of their voice. Inflecting various tones in one's voice can direct how a serious conversation will be conveyed. Give this some thought the next time you have a conversation with friends, family, etc.

[Return to the Verbal Communication and Conversation Topics menu](#)

10.1.2: Exploring the Five Parts of Conversation

Conversation is one of the main ways we interact in the business environment, and yet it's highly susceptible to miscommunication and misunderstandings. Our everyday familiarity with conversations often makes us blind to the subtle changes that take place during the course of a conversation. Examining it will help you to consider its components, predict the next turn, anticipate an opening or closing, and make you a better

conversationalist. Steven Beebe, Susan Beebe, and Mark Redmond (2002) break the conversation down into five stages that we will adapt here for our discussion.

Initiation: This occurs at the beginning of the conversation and requires your interaction with others. Ice breakers and engaging in “small talk” can start a conversation, drawing people out of their comfort zones and into a casual situation. Conversation starters such as “How are you?” “Cool jacket. Where did you purchase it?” and “Have you watched the new Batman movie yet?” are great to draw people out.

Preview: A preview of a conversation, either verbally or nonverbally, indicates the topic. Think of an email that contains only one to two words in the subject area. This preview alerts the receiver about the intended subject matter of the conversation and prompts a response.

Business: During this part of the conversation, we are now getting to the intention of the conversation. It would be helpful to have three points of focus in mind so that the topic is covered completely. This will also ensure that the receiver has been given all of the information necessary to make an informed decision and/or response.

Feedback: Feedback gives the speaker an opportunity to clarify, restate, or further discuss the major points of focus. The main mission of this part of the conversation is to ensure that the receiver understands the information being given.

Closing: During the final stage of the conversation, the speaker should thank the listener or receiver for allowing them the time to speak. It is also at this time that the speaker can give contact information in the event that further information is needed. Most importantly, the speaker should not return to the main three points of the topic or introduce a new topic. These events would not be well received by the listener.

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10.1.3: Conversation in the Digital Age

When you enter the workforce, you will have to communicate with people of various age groups. Each group of people has a different communication style and preference, and knowing how to communicate effectively with that group of people will take time. Do you prefer to use texting apart from an actual telephone call to communicate with others? If you answered yes, you may have a difficult time in the workplace. You will have to consider the fact that not everyone grew up with a smartphone or cell phone, which introduce various ways of communicating, such as texting. Some individuals may feel that the only way to truly communicate and understand the message is through a tried-and-true method such as a telephone call.

Many young adults prefer the ease of using a smartphone and other social media applications because it is comfortable and quick to manipulate. However, the perceived addiction to using these mediums can be detrimental to developing meaningful verbal conversations. Individuals must then begin the process of cultivating conversations that can prove to be terrifying to some and bring anxiety to someone who is otherwise uncomfortable with face-to-face encounters.

Below, you will find a list of points that Celeste Headlee covers in her video on how to have a better conversation:



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1. Don't multitask—Focus on the conversation.
2. Don't pontificate—Be prepared to learn from others.
3. Use open-ended questions—Give room for them to express themselves
4. Go with the flow—Keep comments and questions relevant to the moment.
5. Say when you don't know.
6. Don't equate your experience to theirs.
7. Don't repeat yourself.
8. Leave out tiny details.
9. Listen to understand.
10. Be brief.

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10.1.4: Using the Telephone and Voicemail Effectively

The simplest form of an audio-only conversation is a telephone call. A phone call is advantageous whenever you need a consistent pace of conversation with someone to sort out details in a timely manner but are too distant from them physically to do it in person. Some make the mistake of choosing written channels like email or text, drawing out the communication process over hours or days to discuss matters that would take mere seconds or minutes by phone. As long as you don't need details permanently recorded in writing, the phone is a feasible channel to discuss details for any busy professional. Though you've probably talked on the phone countless times throughout your life, you may not yet have had the chance to do so professionally, where the expectations for competence are much higher than in social or family contexts—so much so that some executives hire professional voice coaches to help them increase their effectiveness in phone communication. The importance of audio communication in business and industry has increased with the availability of conference calls, voice over internet protocol (VoIP), voice-activated electronic menus, and voice-to-text dictation software such as that in the Gboard (Google keyboard) app for smartphones. We'll examine how to improve your style of conversation in an age where many prefer to text rather than call.

1. **Speak slowly and clearly articulate your words.** By following this method, you are ensuring that your words are being understood without having to be repeated.
2. **Use colorful terms.** You want to describe what you are saying so that the listener has a visual connection to the message.
3. **Be specific.** Ensure that your information has been received. If necessary, repeat the information, particularly when relaying addresses and/or phone numbers.
4. **Keep your conversations private.** Consider others and the information being exchanged by taking or making calls in a private location. Taking or making professional calls in a restaurant, grocery store, or elevator would not be an ideal situation.
5. **Silence cell phones and other devices** when you are meeting with others, during class, or within other social settings.

When you phone someone but are sent to voicemail because they don't pick up, switching to monologue mode means that you can only get as far as the preview stage of the conversation structure outlined above. You'd still open by saying hello, your full name, and your company. The limit on how much recording time you have (30 seconds? 60?—you may not know) and the absence of feedback from the listener, however, means that you can really only say what the call is about in concise, clear terms. A long, rambling voicemail message may be cut off and you may not even know it, and it also increases the possibility for misunderstandings without being present to clarify based on your listener's responses. Anything that needs discussion must be saved for the actual conversation, especially anything of a sensitive nature. Recording confidential information is potentially dangerous to you and others.

Add your contact information, even if you think the person already knows your phone number, and say it twice slowly so that the listener has additional time to get a pen and paper if they're still looking for them the first time you say it. Imagining you were writing down your phone number as you recite it will help you deliver it at a listener-friendly speed (Business Communication for Success, 2015, 15.2). Precise pronunciation is crucial because "60" and "16" or "90" and "19" may sound the same in a strong accent.

Be prepared to receive voicemail by recording a professional-sounding call-back message that begins after about 4–5 rings. Top professionals record a new one every morning when they begin work and include the date in it. They can thus state what their availability is throughout the day and assure the listener how quickly to expect a callback. When you receive a voicemail, return the call as soon as possible. The 24-hour rule of email doesn't apply to voicemail because the person who called you chose this channel deliberately expecting to discuss something with you "live" in a timely manner. With so many channels available, using the phone implies a sense of urgency.

[Return to the Verbal Communication and Conversation Topics menu](#)**Key Takeaway**

Success in the workplace depends on your ability to effectively engage coworkers, clients, managers, and other stakeholders in face-to-face conversation and on the phone.

Exercises

1. Reflect on your personal use of technology. Would you consider your relationship with your smartphone an addiction? Do you feel that it erodes your people skills and ability to engage meaningfully with other people? Write a one-page response and defend your position with evidence.

2. How comfortable are you with speaking on the phone? Are you more likely to text someone than call them, even if calling would be quicker, you're both available, and there's no reason why either of you couldn't just talk? Reflect honestly on why you prefer to text rather than to talk (if that's the case). Next, exchange phone numbers with a classmate you haven't previously spoken with and have a conversation on the topic.

10.2: Ethics and Professionalism**Section 10.2 Learning Objectives**

1. Define professional behavior according to employer, customer, coworker, and other stakeholder expectations.
2. Explain the importance of ethics as part of the persuasion process.

3. Define and provide examples of sexual harassment in the workplace, as well as strategies for how to eliminate it.

As we are developing various communication plans to utilize while working in the world of business, we must also explore the importance of maintaining professional behavior. Having a pleasant demeanor and developing a trusting manner are desirable in any employee. These traits can also help you to collaborate more easily with others, maintain employment, and provide other opportunities.

Professionalism and Ethical Behavior Topics

- [10.2.1: Professionalism on the Job](#)
- [10.2.2: Proper Business Etiquette](#)
- [10.2.3: Sexual Harassment in the Workplace](#)

10.2.1: Professionalism on the Job

The type of behavior that you exhibit within the workplace should reflect your overall work demeanor. Your body language and tone can affect how future interactions will take place, as well as how your coworkers, employers, customers, and clients will view you in the workplace. By following these areas, you can cultivate and maintain professionalism consistently.

Civility is defined as a polite act or expression. The general rule here is to treat everyone respectfully. Adopting this trait will create a positive experience for all who interact with you.

Social intelligence involves following clues when interacting with others in terms of actively listening to others around you. You should be able to read nonverbal clues in the following situations:

- How and when to initiate conversation
- When it's your turn to speak and when to listen in order to keep a conversation going
- What to say and what not to say
- How to say what you mean in a manner that will be understood by your audience
- When and how to use humor effectively and when not to
- How and when to end the conversation gracefully

In some instances, individuals may appear awkward in conversations. This is due to not developing the necessary conversational skills needed to enhance their social intelligence. Having a conversation with someone who lacks social intelligence is usually a one-sided situation, which may result in an abrupt end to the conversation. These skills can be developed by practicing good conversational skills and applying them daily.

Like social intelligence, emotional intelligence also involves being able to interpret the emotions of others in social settings and knowing how to handle those situations. Some instances will require you to remain neutral or to develop a “poker face” in order to mask your feelings, especially in professional situations. You will have an opportunity to gauge how others are really feeling without outwardly showing emotion. Such nonverbal clues as eye movements, facial expressions, body posture, and hand gestures would serve as warning signs and allow one to diffuse a situation before it becomes worse.

Social graces equal possessing good manners such as being polite to others, knowing the proper etiquette for dining, as well as dressing appropriately in certain situations. The simple application of saying thank-you and please can speak volumes to your character and professionalism.

[Return to the Professionalism, Etiquette, and Ethical Behavior Topics menu](#)

10.2.2: Proper Business Etiquette

Etiquette is a code of behavior that extends to many aspects of how we present ourselves in social situations. Thus far, we have covered specific written applications (e.g., using a well-mannered, courteous style of writing, such as saying please when asking someone to do something). In this section, we will focus on dining etiquette and dress.

Throughout your work experience, you may be invited out to lunch or dinner with your supervisor. During this time, your superior will assess how you handle yourself and if you are applying good manners. Your lunch or dinner may serve as a “test” to see if you possess the necessary professional traits of the company and if they can entrust you with hosting future clients. Kent State University provides a dining etiquette guide (Career Exploration and Development, 2022) that gives a thorough explanation of expectations.

It is imperative to inquire about the type of workplace attire required before beginning your employment. Many organizations require a particular style of clothing or uniforms, while others accept casual clothing. Your dress will dictate how others view you professionally and how clients will see you as a representative of the company. Most importantly, you do not want to be out of compliance by not dressing appropriately.

In addition to dressing appropriately, there may be other forms of personal expression or certain accessories that may not be allowed such as:

Tattoos: Depending on the company policy, you may be asked to wear long-sleeved shirts in order to cover these or asked to remove them.

Piercings: Although earrings are a popular item among women, the stretched earlobe, nasal piercings, etc. may not be acceptable to some employers.

Dyed hair: Dyed hair is a personal expression, but depending on the industry, it may not be acceptable for some companies. Some companies may actually find this freedom of expression a distraction.

The best rule is to check with the company beforehand. If some of the above situations are temporary, the company may be able to work with you. However, it is also best to keep a professional, toned-down appearance. Please access the video regarding how to dress for success:



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10.2.3: Sexual Harassment in the Workplace

The U.S. Department of Labor defines sexual harassment as “a type of harassment on the basis of sex prohibited by Executive Order 11246.” This can include unwelcome sexual advances, requests for sexual favors, offensive remarks about a person’s sex, and other verbal or physical conduct of a sexual nature. At the end of 2020, according to the U.S. Equal Employment Opportunity Commission, 11,497 charges of alleged sexual harassment were filed.* Harassment of any kind is not prohibited and in order to prevent it, all employees should develop a respectful tone in regard to others. Please review the following infographic concerning workplace sexual harassment: [2021 Guide to Workplace Sexual Harassment](#).

Would you recognize signs of sexual harassment if it happened to you or if you witnessed it happening to someone else? As listed within the State of Louisiana’s Sexual Harassment Policy, the following actions are considered inappropriate and may meet the definition of sexual harassment or contribute to a hostile work environment within Louisiana law (may include but are not limited to the following items):

- Sexual pranks or repeated sexual teasing, jokes, gestures, or innuendo
- Lewd comments about an individual’s body
- Touching or grabbing of a sexual nature
- Talking about one’s sexual activity in front of others
- Inappropriate unwelcome conduct of a sexual nature, such as cornering, repeatedly standing too close to or brushing up against another’s body, or leaning into or over a person
- Giving gifts or leaving objects that are sexually suggestive
- Posting, making, or displaying pornographic, sexually demeaning, or sexually explicit material in the workplace
- Pressure for unnecessary personal interaction
- Off-duty, unwelcome conduct of a sexual nature that affects the work environment
- Making sexual statements in person, in writing, or electronically, such as through email, instant messaging, text messaging, blogs, web pages, social media, etc.

Companies should make it a priority to ensure that employees have a workplace free of harassment. All

employees should be provided with sexual harassment policies within a company handbook. A mandated sexual harassment prevention training annually, at a minimum, would also familiarize employees with the consequences of harassment and set a no-tolerance culture within the company.

*It should be noted that this does not include charges filed with state or local Fair Employment Practices Agencies.

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Key Takeaway



The quality of any workplace culture depends on the ethical conduct of its leadership and employees, with everyone treating one another with respect and speaking responsibly.

Exercises



1. First, think of someone who exemplifies everything you aspire to be in terms of their good behavior in the workplace (loosely defined as anywhere someone does work—not necessarily where it's compensated with money). List the qualities and actions that make them such a good, well-liked model for behavior. Second, think of someone who exemplifies everything you aspire to avoid in terms of their misconduct in the workplace. List the qualities and typical misbehavior that make them so detestable.

2. Deliver a short presentation on dining etiquette or how to dress for success in the workplace with clear recommendations for how your audience should conduct themselves (follow [Chapter 12](#) on presentations beforehand).

3. Find an example of advertising that is unethical because it relies on logical fallacies and other deceptive techniques explored. Identify the fallacies or techniques and speculate on why the advertiser used them. Outline a more honest—yet still effective—advertisement for the same product or service.

Test Your Understanding



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<https://louis.pressbooks.pub/businessprofessionalcomm/?p=611#h5p-45>

10.3: Effectively Answering Interview Questions

Section 10.3 Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
2. Identify successful strategies for job interview preparation.
3. Explain how best to answer standard and behavioral job interview questions.

In Chapter 9, we began the job application process by searching for jobs, creating résumés, and crafting cover letters. In this process, these would serve as your first means of communicating with potential employers, using written communication. The next step in this process involves the job interview, which will showcase your verbal communication skills. Job interviews can vary in nature. Some interviews may take an informal approach, such as simply sitting with a potential employer in a casual setting and answering questions. Other interviews may be more formal, with potential candidates arriving at a predetermined location and being questioned by one individual or a panel regarding an open position. In either instance, the main point of an interview remains confirming that the candidate is the right fit for the job.

Advice regarding how to handle a job interview is varied, and there isn't one particular style that would fit all scenarios. However, a job candidate can use some general rules and prepare for this verbal event. You should be

mindful of the location where your interview will take place. Although traditional interviews occur in person, many companies are now preferring virtual interviews. Within the next few sections, we will discuss how to prepare for a successful interview.

Job Interview Topics

- [10.3.1: Prepping for the Interview](#)
- [10.3.2: The Dress Rehearsal](#)
- [10.3.3: Effectively Answering Interview Questions](#)
- [10.3.4: Post-interview Follow-up Messages](#)

10.3.1: Prepping for the Interview

Finally! You’ve received a call from your desired potential employer, granting you an interview. However, don’t begin your celebration just yet. Now is the time to truly deepen your knowledge about the company and polish your verbal skills so that you can ace the interview. Your desired end result: landing the job! Here are a few things that can help you prepare:

Research the company more thoroughly: One of the questions you may be asked during an interview is “Tell us what you know about our company.” Potential employers are testing you! They want to know if you actually took an interest in finding out the company’s background, their products or services, their ties to the community, etc. This means that you should do a little more than just visit the website and access a few tabs. Check into the company’s mission or vision statement and see if it aligns with your thoughts and values. Look into their policies and procedures (if available). Search for their quarterly or annual reports. If you are able to give information about their company, the interviewer(s) will note that you have a vested interest.

Research your position more thoroughly: A great resource for this would be someone who is holding a similar position with the company or someone with knowledge of the position working within the company. You may be able to glean additional information such as working conditions, morale, etc. Another resource for this position involves completing a search of the position on a broader scale. For example, you can access one of the following websites for further information regarding careers, company profiles, and/or employment-related resources. Here are just a few:

[Career Explorer—SOWELA Technical Community College](#)

[Delgado Career Services](#)

[Northwestern State Career Center](#)

[SLCC Career Success](#)

[ULM Career Center](#)

[Louisiana Workforce Commission: LAWorks Homepage](#)

[Indeed: Job Search](#)

Anticipate questions and prepare talking points: Start with the most-asked question: “Tell me about

yourself.” Begin building and practicing answering basic questions regarding the position. If you are interviewing for a position as a data entry clerk, it would be good to know how many words per minute you can type, which software programs you are familiar with, and how to operate a 10-key instrument, as well as explain their processes. This is also a good time to begin practicing your tone and limiting hand gestures so that you will present a calm and refined demeanor when interviewing.

Rehearse with mock job interviews: Of course, preparing a set of notes is not helpful if you lack the time to study and rehearse your responses in a mock job interview situation, so manage your time effectively and schedule mock job interviews throughout the week prior to your actual interview. The more comfortable and familiar you are with the interview dynamic of someone asking you questions and you respond, the more confident and articulate you will be during the real interview. Enlist a family member, friend, counselor, or career coach from your institution to ask questions you anticipated, as well as some of you that you haven’t. Help from a friend or acquaintance who is an employer themselves would be especially helpful because they can draw on personal experience to advise you on what works and what doesn’t from their managerial perspective. Their honest feedback will be invaluable as long as you accept and implement their constructive criticism. You may also get a sense yourself of what works and what doesn’t, but having someone else to talk to about it and work it out will do wonders for your interview preparation.

Arrive early: It is a good idea to arrive at least 30 minutes before your scheduled interview. This buffer allows time for you to use the restroom and freshen up. You allow yourself time to try a few deep-breathing exercises in an effort to calm yourself and appear less nervous. Also, during this time, you may be asked to complete an employment application, and depending on its length, it may take some time.

[Return to the Job Interview Topics menu](#)

10.3.2: The Dress Rehearsal

Your dress attire serves as a form of verbal communication and gives your potential employer insight into how you view the seriousness of the position. For interviews, you would be better served wearing attire suited for that particular industry. Please review the following video regarding appropriate interview dress attire:



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Last-minute items before the big interview:

- Make sure your jewelry is at a minimum. Nothing should distract the interviewer.

- Hats should not be worn at any time during an interview.
- Cell phones should be put on silent or turned off completely!

[Return to the Job Interview Topics menu](#)

10.3.3: Effectively Answering Interview Questions

As previously mentioned, one of the most commonly asked questions in an interview is “Tell me about yourself.” This is not the time to give personal information. The interviewer wants to know about you—your skills, your educational background, and your certifications. Although this information is provided on your résumé, the interviewer wants to see how well you verbally communicate.

If you are unsure of an answer, you can take a breather, stating, “Let me think about that question” or something similar. Your answers shouldn’t take longer than 3–4 minutes, unless the interviewer has requested an elaboration. Giving concise answers that contain relevant information will show your interviewer that you have prepared adequately for the interview.

There are, however, certain questions that are deemed illegal questions. These questions can be used to discriminate against you within the hiring phase. Such questions are as follows:

- Age
- National origin, ethnicity, or religion
- Disabilities
- Health conditions
- Marital or family status
- Sexual orientation

Please access the video regarding top interview tips:



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[Return to the Job Interviews and Follow-up Messages Topics menu](#)

10.3.4: Post-interview Follow-up Messages

The day after a job interview, write a follow-up email thanking the employer for their time and interest.

Though you may consider this an optional cherry on top of a successful job interview, it's really more of an expected formality in the modern job interview process. When the hiring committee meets to discuss the five or six candidates who were interviewed, those who neglected to send a thank-you note will look uncaring or neglectful compared to those who demonstrated thoughtful and considerate gratitude by writing a note. The message's length shouldn't be minimal but must be well written and error-free.

Once this message goes out, move on. As good as you might feel about how you did, you won't have any idea what they decide until you hear back from them. Sometimes the best candidate doesn't get the job after all, so don't torture yourself by checking your phone and email every five minutes for the good or bad news. Instead, focus on your next applications. When your job is to get a job, it should be a full-time occupation that you don't rest from until you accept a job offer.

If you get a follow-up message saying that another candidate is better suited to what the selection committee was looking for, feeling dejected and getting upset are natural reactions to the bad news. What's really important at this point is that you do two things:

1. Don't respond angrily by demanding a reason why you were rejected or what the winning candidate had over you. The employer will simply be protecting itself from legal action when they say that they can't go into detail about their decision, especially because all of the people on the committee will likely have signed confidentiality agreements to not discuss their decisions with anyone outside of the committee. Instead, accept defeat gracefully. Who knows—they may have been impressed enough that when they follow through on plans to hire again in six months, they'll have you in mind.
2. Learn from the experience. The more interviews you do, the more you figure out what works and what doesn't based on reading the reactions around the room and how you feel afterward. Reflect on where you could have improved and keep a set of notes on what you would do better next time. In the meantime, keep applying to other positions, building your professional network, and even adding skill sets and educational experience that would better position you for the jobs you want.

If you decide on the basis of the interview to withdraw from the competition before the company even sends you their decision, the courteous thing to do would be to immediately send a polite message explaining that you would no longer like to be considered for the position. Courtesy in this case is especially important if your reason is that you accepted a job offer from a more attractive company. You don't have to say that that's the reason, but you want to keep the door open to the company you're rejecting in case it doesn't work out with the company you're going with after all. You may not get a second chance with the company you're rejecting, but you definitely won't if you burn that bridge with a snarky email, and you never know who they might talk to (a future potential employer?) about any untoward behavior.

If all goes well and you get a job offer or if you're informed that you're the leading candidate either by phone or by email, of course you should express your excitement and gratitude for them selecting you. From there, you may have several formalities to follow through on, such as submitting the names and contact information

of references and filling out other paperwork, all of which you must do promptly and perfectly lest your success be still dependent on your degree of compliance through the confirmation process.

[Return to the Job Interviews and Follow-up Messages Topics menu](#)

Key Takeaway



Considering that a job interview is an oral communication test, study for it the way you would any other important exam: by anticipating questions, practicing your responses, and rehearsing with timed trials; for the interview itself, control everything in your power to win the job competition with your best possible performance.

Exercise



Conduct a mock job interview with a classmate where you both take turns as interviewer and interviewee. Use some of the standard question variations given throughout §10.3.2.3 and §10.3.2.4 as a basis for your list of questions, but modify them to suit the profession you are training for. As a basis for your role-play scenario, use the job posting that you selected and wrote a targeted résumé and cover letter for in the Chapter 9 end-of-section Exercises.

10.4: Examples and References

10.4.1: Interview Tips

[U. S. Department of Labor—Interview Tips](#);

10.4.2: Sample Interview Questions

[50+ Most Common Interview Questions and Answers](#)

10.4.3: Videos of Good and Bad Interviews

[Job Interview...Good Example:](#)



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[Job Interview...Poor Example:](#)



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CHAPTER 11: GROUP COMMUNICATION

Adrienne Abel

Chapter Learning Objectives

1. Examine the importance of teamwork and how to contribute positively to the team dynamic.
2. Define teamwork in professional settings.
3. Compare and contrast positive and negative team roles and behaviors in the workplace.
4. Discuss group strategies for solving problems.
5. Rank several types of response to conflict in the workplace in order of most appropriate to least.
6. Explain a collaborative approach to resolving workplace conflict.
7. Explain the purpose and contents of the meeting agenda and minutes.
8. Demonstrate best practices in web conferencing for professional situations.

- [11.1: Teamwork](#)
- [11.2: Resolving Conflicts](#)
- [11.3: Group and Web-based Meetings](#)
- [11.4: Examples](#)
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11.1: Teamwork

Section 11.1 Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
2. Define teamwork in professional settings.
3. Compare and contrast positive and negative team roles and behaviors in the workplace.
4. Discuss group strategies for solving problems.

Almost every posting for a job opening in a workplace location lists teamwork among the required skills. Why? Is it because every employer writing a job posting copies other job postings? No, it's because every employer's business success depends on people working well in teams to get the job done. A high-functioning, cohesive, and efficient team is essential to workplace productivity anywhere you have three or more people working together. Effective teamwork means working together toward a common goal guided by a common vision, and it's a mighty force when firing on all cylinders.

Teamwork Topics

- [11.1.1: Team Member Roles](#)
- [11.1.2: Team Problem-Solving](#)
- [11.1.3: Team Leadership](#)
- [11.1.4: Communication within the Team](#)

11.1.1: Team Member Roles

The success of a team falls on the working dynamic of its members. Each team member should put forth an effort to contribute wholeheartedly to the overall team project. The only way to accomplish this task is to assign or defer various roles to each member. If you are serving in the capacity of a project manager, you would focus on creating a diverse team that has various personalities and work ethics. The purpose of creating a diverse team is to embrace the differences that various team members possess. Team diversity doesn't just relate to ethnicities or gender, but it also means such differences as age, training, technical skills, and work experience. Companies find that projects completed by a diverse team yield favorable results and are more inclusive of many demographics.

In the following video, take note of ways to create an effective team environment:



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=626#oembed-1>

In Table 11.1.1a, you will find a list of positive group roles and their actions. Table 11.1.1b shows a list of negative group roles. Notice the contrast in the two lists and decide which team would be more suitable for a successful work environment.

Table 11.1.1a: Positive Group Roles

Role	Actions
Initiator-coordinator	Suggests new ideas or new ways of looking at the problem
Elaborator	Builds on ideas and provides examples
Coordinator	Brings ideas, information, and suggestions together
Evaluator-critic	Evaluates ideas and provides constructive criticism
Recorder	Records ideas, examples, suggestions, and critiques
Comic relief	Uses humor to keep the team happy

Table 11.1.1b: Negative Group Roles

Role	Actions
Dominator	Dominates discussion so others can't take their turn
Recognition seeker	Seeks attention by relating discussion to their actions
Special-interest pleader	Relates discussion to special interests or personal agenda
Blocker	Blocks attempts at consensus consistently
Slacker	Does little-to-no work, forcing others to pick up the slack
Joker or clown	Seeks attention through humor and distracting members

(Beene & Sheats, 1948; McLean, 2005)

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11.1.2: Team Problem-Solving

In any type of environment—within the classroom, in a family setting, or within an employment situation—problems will arise. This will happen within teams just as it will occur between individuals. In Rebecca Knight’s article “Is Your Team Solving Problems, or Just Identifying Them?” the author relates that while team members may ask questions and generate new ideas, constructive feedback should be provided. In order to solve problems effectively, team members can use these steps adapted from Scott McClean (2005):

1. Define the problem—Find out what the true problem is and what isn’t.
2. Analyze the problem—Figure out the basis of the problem and what’s causing it.
3. Establish criteria for a successful resolution to the problem—Set guidelines for how your team would like to gather information regarding the problem (specifics such as timing, placement, parties involved, etc.),
4. Consider possible solutions—During this step, all team members should contribute their ideas on how the problem may be resolved.
5. Decide on a solution or a select combination of solutions—During this stage, an analysis of all possible solutions should be gathered. The cost and benefits of each proposed solution would be discussed by the entire team.
6. Implement the solution(s)—Once a solution has been decided upon, your team will put the plan into action.
7. Follow up on the solution(s)—Your team should revisit the situation by either conducting a follow-up meeting or simply sharing the results by interoffice mail, memo, email, etc.

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11.1.3: Team Leadership

Successful teams are driven by a good leader. The leader sets the tone for the team, guiding them and helping them to stay on task. If a team leader is not chosen, that leaves a lot of room for error, miscommunication, and misdirection that can ultimately cause the project to be either delayed or not completed. In the following video, a little insight is given into leading teams:



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=626#oembed-2>

What characteristics make an effective leader? An effective leader possesses a combination of skills, talents, and traits that enables them to direct individuals without cause. Anyone can be groomed in the art of leadership; however, it takes a certain skill set, along with empathy, compassion, and other valuable traits needed to become a leader. The following are some types of leaders that you may come in contact with:

Autocratic leader: This type of leader is self-directed and establishes norms and conduct for the group.

Laissez-faire leader: “Live and let live.” This type of leader allows others to be creative and use their resources. You won’t find someone micromanaging or getting too involved with this type of leadership.

Leader-as-technician: This individual may serve as an expert in some areas that would support the other team members.

Leader-as-conductor: This type of leader guides the team through the movement of the project, setting benchmarks and collaborating frequently with feedback.

Leader-as-coach: Leadership in this form serves as the motivator or cheerleader. Team members can expect specific directions and input in an effort to continue the project moving forward.

Within any work environment, you would desire a fair leader. Unfortunately, there are some leaders who create stressed work environments with their lines of authority. If you experience any of those behaviors, an article from *Forbes* magazine entitled “13 Effective Tactics for Dealing with a Toxic Boss” gives the following suggestions:

- Seek clarity.
- Do your job and drop your ego.
- Assume positive intent and provide feedback.
- Try to have a candid conversation.
- Start by assessing your own values.
- Learn and adapt.
- Become a trusted partner
- Focus on helping, not judging
- Don’t take it personally
- Control your reactions.
- Set boundaries.
- Avoid them as much as possible.
- Document, document, document.

Another spectrum of a toxic work environment may include harassment—verbal, sexual, or physical. If you experience any of these types of behaviors, please note that action can be taken regarding safeguarding yourself from any undue harm. It is important to follow the guidance given in your employee/company handbook and how to proceed with reporting this behavior. Additionally, you can seek information from the following resources:

- [OSHA—Workplace Violence](#)
- [Labor Law Information Resources—Louisiana Workforce Commission](#)
- [Louisiana Board of Regents—Title IX/Power-Based Violence](#)

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11.1.4: Communication within the Team

Communication is vital for completing any project. Discovering ways to effectively communicate with the team should contain inclusive methods for best results. *Forbes* magazine published an article (Richard, 2020) that discusses strategies for improving communication with team members:

Ensure that your communication has a purpose. If your communication is not clear, your desired message would not be received as intended.

Have a plan when meeting with your team members. You should always prepare a written agenda. Meetings should be brief and kept on task. Additional information regarding agendas will be covered in Section 11.3.1.

Sensitive situations. There may be times when your team will cover sensitive topics. These situations may warrant additional personal conversations to resolve any issues or concerns.

Mode of communication. Make a decision on which mode of communication your team will use throughout the project. Due to differing schedules, your team may choose several avenues such as email, texting, instant messaging, video calls, etc.

Keep your team updated. Throughout your project, the team should receive regular updates. If deadlines for certain items were identified at the beginning of the project, marking them as “completed” states that a goal has been reached.

Your responses to your team and others can help determine if communication is received correctly. This is evidenced in the form of feedback. Feedback may present in several forms: positive or negative. Positive feedback presents as receiving praise for a job well done or giving a satisfactory evaluation of a team member. The opposite type of feedback is negative feedback or negative criticism, where you may receive information about a poorly executed job without any suggestions for improvement. In a leadership role, it is important to always offer suggestions or helpful recommendations in order to assist one’s performance.

Constructive criticism is set apart from negative criticism because it involves improving situations with detailed instructions to execute in an effort to meet expectations. In a leadership role, instead of focusing on the negative aspects, speak to the writer about what is fixable. It is imperative to give clear and specific points that will be needed for the writer to correct their mishaps. Encouraging the writer to take care with revision, spelling, and grammar checking not only will build the confidence of the writer but will also help the writer with future assignments or projects.

Constructive criticism can also be given nonverbally and can be indicated by listening. Becoming a good

listener also means being able to take direction or criticism without being defensive. If you immediately begin listing defensive tactics mentally, you're not effectively listening to the criticism being given.

Receiving constructive criticism in a way that assures the speaker that you understand involves completing the communication process. Indications that you are truly listening revolve around nonverbal clues such as the following:

- Maintaining **eye contact** shows that you're paying close attention to the speaker's words and nonverbal inflections.
- **Nodding** your head shows that you're processing and understanding the information coming in, as well as agreeing.
- **Taking notes** shows that you're committing to the information by reviewing it later.

The "Poop Sandwich" Method



Cliparting.com. (n.d.). *Sandwich Clipart – Image #25446*. Retrieved May 2, 2022, from <https://cliparting.com/free-sandwich-clipart-25446/>

One way of delivering constructive criticism is to utilize the "poop sandwich" method. With this method, the receiver is made to feel good about themselves to appear more receptive to hearing, processing, and recognizing the constructive criticism being given. If the "poop" (constructive criticism) focuses on the improvement needed, then the receiver will relate it to praise that comes before and/or after (the slices of bread) the improvement has been made. The following table illustrates the "poop sandwich" feedback:

Table 11.1.4.: Poop Sandwich Feedback

Feedback	Example
1. Sincere, specific praise	Your report really impressed me with its organization and visually appealing presentation of your findings. It's almost perfect.
2. Constructive criticism	If there's anything that you can improve before you send it on to the head office, it's the writing. Use MS Word's spellchecker and grammar checker, which will catch most of the errors. Perhaps you could also get Marieke to check it out because she's got an eagle eye for that sort of thing. The cleaner the writing is, the more the execs will see it as a credible piece worth considering.
3. Sincere, specific praise	Otherwise, the report is really great. The abstract is right on point, and the evidence you've pulled together makes a really convincing case for investing in blockchain. I totally buy your conclusion that it'll be the future of financial infrastructure.

In an earlier chapter, delivering bad news in writing was discussed, but how do you deliver bad news in person? The delivery of bad news in a face-to-face setting is more beneficial because the delivery can be more effective,

particularly within the workplace. The majority of people shy away from conflict, thus the preference for using electronic channels to communicate bad news. No one enjoys creating a sad or angry situation that could quickly turn into a retaliatory confrontation or provoke emotional outbursts.

The best plan of action, in this case, would involve having a clear goal. Stephen Covey (1989) recommends beginning with the end in mind. Do you want your negative news to inform or bring about change? If so, what kind of change and to what degree? A clear conceptualization of the goal allows you to anticipate the possible responses, plan ahead, and get your emotional “house” in order.

The response to the news and the audience, regardless of if it involves one person or a group, sets the tone for the interaction itself. It is natural to have feelings of frustration, anger, and hurt; however, displaying these types of feelings can actually worsen the situation further. If the deliverer of the news keeps a mild or neutral tone, then the receiver is more than likely to respond in that same tone.

If you are delivering the bad news to an individual, make sure that the message doesn't get lost in translation. Find out which mode of communication works best for both parties. Written responses (i.e., email or letter) may work in some instances; however, the tone of the response may be misunderstood. A face-to-face meeting might be the answer, but again, you should watch your body language in your delivery. In either scenario, the deliverer should be comfortable enough to deliver the message.

In the workplace, you may have to deliver bad news to a group of people or a department. A presentation or speech may be the best option for this scenario. Allow for a question-and-answer period and end your delivery on a positive note. You should follow the previous steps mentioned and prepare for a variety of reactions. How you handle yourself in this scenario will provide a basis for how the audience will receive and react to the news.

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Key Takeaway



Almost all jobs require advanced teamwork skills, which involve being effective in performing a particular role (e.g., leader) in a working group, contributing to group problem solving, and both giving and receiving constructive criticism.

Exercises



1. Think of a group you belong to and identify some of the roles played by its members. Identify your role (give it a label, perhaps based on those given in [§10.3.1](#)) and explain how it enriches the group.
2. Consider past group work you've done in high school or even recently in college and identify a particular problem you had to overcome to guarantee the group's success. Did the group as a whole contribute to its solution, or did an individual member have to step up and pull through? Describe your problem-solving procedure. Was it successful immediately or did it require fine-tuning along the way?
3. Identify a problem that can only be solved with teamwork in the profession you'll enter into upon graduating. Describe the problem-solving process using the seven-step procedure narrated in [§10.3.2](#).
4. Think of a leader you admire and respect, someone who had or has authority over you. How did they become a leader? By appointment, democratic selection, or emergence? How would you characterize their leadership style? Are they autocratic or laissez-faire? Are they like a technician, a conductor, or a coach? Do they use the carrot or the stick to get action from the people they have authority over?
5. Roleplay with a classmate the following scenario: You're a mid-level manager and are concerned about an employee arriving 15–20 minutes late every day, although sometimes it's around 30–40 minutes. The employee leaves at the same time as everyone else at the end of the day, so that missing work time isn't made up. What you don't know (but will find out from talking with the employee) is that they must drop their child off at elementary school shortly before 8 a.m., battle gridlock highway traffic on the way to work (hence the lateness), then leave at a certain time to pick their child up from after-school daycare (hence not being able to stay later). What you do know is that talking with the employee in private is the right way to handle this and that the executive director above you considers it your responsibility to have everyone arriving on time and being paid for their hours as stipulated in their contracts; the director isn't afraid of firing someone for such a breach of contract, so you have the authority to threaten the employee with that consequence if you feel that it's necessary. The fact that this employee is being paid for working fewer hours than stipulated in the contract will be a strike against you unless you either get them back on track or fire them if they can't work their full hours. Be creative in discussing an amicable solution with the employee that satisfies everyone involved. Switch between being both the manager and the employee in your roleplay.

11.2: Resolving Conflicts

Section 11.2 Learning Objectives



1. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.
6. Rank several types of response to conflict in the workplace in order of most appropriate to least.
7. Explain a collaborative approach to resolving workplace conflict.

Behavioral questions are usually asked during a job interview. Potential employers want to know how you would handle a crisis at work if it arises. It is a certainty that conflict will appear at one point in your employment. However, the steps that are taken to resolve the conflict can be practiced so that you can make informed decisions during the crisis situation.

First, we should identify what a conflict is and why it arises. According to McLean (2005), conflict is the physical or psychological struggle associated with the perception of opposing or incompatible goals, desires, demands, wants, or needs. Possessing effective communication skills is key to resolving conflicts, and using positive solutions can affect our daily lives and how we handle issues in the workplace. In the next few sections, we will explore several strategies to resolve conflicts.

Conflicts Menu

- [11.2.1: The GRIT Method](#)
- [11.2.2: Conflict Resolution Strategies](#)

11.2.1: The GRIT Method

You might experience conflicts that are serious enough to cause disruption within the workplace culture. This type of disruption can cause low morale, lack of trust, and lackluster productivity. During these times, a method called GRIT can be utilized. GRIT is an acronym for Graduated Reciprocation in Tension-reduction. One side initiates a breakthrough in the form of a compromise regarding one of the demands. The other side responds with a compromise of their own while trying to build trust with one another. Charles E. Osgood (1962) developed this method to assist and ease tensions between the United States and Russia and the threat of using nuclear weapons.

Let's say you find yourself getting between two conflict parties at your job; on one side is a trusted coworker, Jillian, and on the other is the manager, Dante, whom you like very much. They don't see eye-to-eye on the way a major aspect of the operation is set up, and it's caused a rift that is starting to draw other employees in to take sides. Team Jillian doesn't miss opportunities to take pot-shots at anyone on Team Dante for being management lackeys, and Team Dante has been dismissive of Team Jillian's concerns, and its members have been threatening to get Team Jillian's members fired. It doesn't look like this will end well. Your sympathies go to both sides, so you propose to mediate between them. Applying GRIT in this situation would look like the following:

1. Get both sides to **agree to talk formally** with one another in the meeting room with the goal of resolving the conflict. Reasonable human beings will recognize that the toxic environment is hindering productivity and is bad for business. Team Jillian knows that it will be a hassle having to look for and secure new jobs, and Team Dante knows it'll likewise be a lot of work to let everyone go and re-hire half the operation, which will take time and will meanwhile slow operations down even further. No one wants this despite everyone taking sides and digging into their chosen positions till now. The willingness to participate in a conflict resolution process requires that both parties show concern for rescuing the relationship.
2. After sitting down to talk to one another, actually **listen to one another's concerns**. Much conflict in the workplace happens when two sides don't understand each other's thinking. Sharing each other's thoughts in a mature and controlled way will dispel some of the misunderstandings that led to the conflict. One side gets a certain amount of time to state its case uninterrupted. The other gets the same. Then they take turns responding to each other's points.
3. **Establish common ground**. When two sides are locked in a dispute, they usually share more in common than they realize. After discussing their differences, moving forward toward a resolution must involve establishing points of agreement. If both parties agree that the success of their operation is in their best interests, then you can start with such common goals and then work your way down to more specific points of agreement. These may begin to suggest solutions.
4. **Discuss innovative solutions** to the conflict. With everyone in the room representing their various interests within the organization and listening to one another's concerns, a truly cooperative collaboration can begin in identifying solutions to operational problems.
5. Take turns **exchanging concessions GRIT-style**. After establishing common ground and considering pathways toward operational solutions, address the lingering differences by getting both sides to prioritize them and offer up the lowest-priority demands as a sacrifice to the deal you want them to strike. If the other side is like this, the principle of reciprocity compels them to drop their lowest-priority demand as well. Then both sides go back and forth like this with each condition until they reach an agreement.

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11.2.2: Conflict Resolution Strategies

Conflict arises everywhere communication occurs. Effective communicators can predict, anticipate, and formulate strategies to address conflict in order to successfully resolve it. How you choose to approach conflict influences its resolution. Joseph DeVito (2003) offers us several conflict management strategies that we have adapted and expanded for our use below. Let's examine these various responses to conflict.

Managing your emotions: Refrain from being perceived as angry or frustrated. Don't engage in a "war of words." This can result in hurling insults at another person, which not only can be damaging to the other person but may reflect negatively on you as well.

Empathizing: Put yourself in someone else's shoes and see if the emotions that they are experiencing feel right. When you complete this step, you are showing emotional intelligence, which is vital to effective communication. Sometimes, just listening to the other's plight will have a profound effect on you, prompting you to deescalate the situation.

Supportive vs. defensive: In 1961, author Jack Gibb discussed defensive and supportive communication interactions as part of an analysis of conflict management. In the following video, his theories are explained:



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Face-saving vs. face-detracting: A face-detracting strategy compromises the respect, integrity, or credibility of the targeted person. On the other hand, face-saving strategies protect credibility and separate the message from the messenger.

Backpacking: This involves imaginary luggage in which we carry unresolved grievances and grudges over time.

Avoiding: This trait is considered as either a healthy or unhealthy response to conflict, depending on the seriousness of the situation.

Escalating: This trait is considered as either an appropriate or inappropriate response depending on the issue's importance. Examples would include overreacting to a trivial issue, using a loud voice while using offensive language, becoming violent regarding an issue, etc.

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Key Takeaway



Conflict is inevitable in any workplace with human interaction, so responding to it in ways that promote professionalism requires excellent communication skills and conflict resolution strategies.

Exercises



1. Write a description of a situation you recall where you came into conflict with someone else. It may be something that happened years ago or a current issue that just arose. Using the principles and strategies in this section, describe how the conflict was resolved or could have been resolved.

2. Can you think of a time when a conflict led to a new opportunity, better understanding, or other positive result? If not, think of a past conflict and imagine a positive outcome. Write a two- to three-paragraph description of what happened or what you imagine could happen.

11.3: Group and Web-based Meetings

Section 11.3 Learning Objectives



8. Explain the purpose and contents of the meeting agenda and minutes.
9. Demonstrate best practices in web conferencing for professional situations.

Although they can be boring, pointless, and futile exercises if poorly organized, professional group meetings are opportunities to exchange information and produce results when used appropriately in any business or organization. A combination of thoughtful preparation and cooperative execution makes all the difference. Though they typically take place in boardrooms, where participants meet in person, web conferencing enables

face-to-face meetings anywhere in the world. In this section, we examine what makes for effective in-person and virtual meetings before, during, and after.

Meetings Menu

- [11.3.1: Developing the Agenda](#)
- [11.3.2: How to Conduct a Meeting](#)
- [11.3.3: The Importance of Meeting Minutes](#)

11.3.1: Developing the Agenda

Every meeting needs a clear purpose, such as an agenda. An agenda is a document that lists all issues for the business that will be discussed at the meeting. The formality of the meeting will determine which format is used to prepare the agenda. For an informal meeting, the agenda will only list the items that will be discussed during that particular meeting. For a more formal meeting, the agenda could list items such as times, events, speakers, meeting location, and other pertinent information.

The following items are a standard agenda outline:

1. The **time, date, location**, list of **participants**, **purpose** statement, **call to order** identifying the person chairing or leading the meeting
2. **Introductions** if there is even one new participant in the group
3. **Roll call** listing the participants expected, which can be silently checked off by the participant in charge of recording minutes; a note is made beside the name of any absentees so that a list of actual participants is ready for the minutes
4. **Approval of the minutes**, where corrections to the previous meeting's minutes (sent out soon after the previous meeting) are suggested by participants who were there before the minutes are approved by the group for official archiving
5. **Old business** for discussing any issues left unresolved (“tabled”) in the previous meeting
6. **New business** listing topics for discussion in the order of priority so that the most important issues can be dealt with first so that items of lesser importance don't push the important ones off the agenda and into the next meeting if the lesser items end up taking longer than expected
 - The expected length of time is indicated for each item, with contentious items getting extra time to accommodate the depth of discussion expected.
 - Items may include proposals for new initiatives, brief presentations reporting on recent developments or existing initiatives, and discussions about recent or upcoming developments
 - Any preparatory work is indicated such as readings (e.g., reports that will be discussed) or reports that must be presented by individuals.

7. **Adjournment** for discussing when the next meeting shall take place.

Those individuals who will participate regarding specific agenda items for the meeting should be contacted well in advance of the proposed meeting date. Once those individuals have been confirmed (preferably in writing or via email), the agenda should be prepared. It is also imperative that the meeting room and proposed time period are confirmed. After these specifics are secured, the meeting agenda should be sent to all meeting participants at least a week prior to the scheduled meeting date.

The use of certain software products allows for the ease of sending meeting invitations. The invitations can be confirmed through this medium as well as track those individuals who have “accepted” or “declined” attending the meeting. If you are the organizer of this meeting, you also have the option of sending meeting reminders one day prior to the meeting.

It is key to assure that your meeting runs smoothly. One way to accomplish this would be to ensure that you have adequate space for the meeting participants. You may want to “preset” the meeting by setting out pens, notepads, coffee/tea/water, and/or snacks. Also prior to the meeting, make sure that any electronic devices that may be needed for the meeting, such as a laptop or a projector, are in working order.

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11.3.2: How to Conduct a Meeting

In this video, you can learn a few tips on conducting meetings:



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Exploring this concept further, Mary Ellen Guffey (2007) provides a useful checklist for participants as a guide for how to conduct oneself during a meeting, adapted below for our use:

- Be prepared and have everything you need on hand.
- Arrive on time and stay until the meeting adjourns (unless there are prior arrangements).
- Turn off cell phones and personal digital assistants; don’t just switch them to vibrate and put them on the tabletop.
- Engage in polite small talk with participants before the meeting begins; don’t cut yourself off from human interaction by looking at your phone.
- Follow the established protocol for taking turns speaking.
- Respect time limits.

- Leave the meeting only for established breaks or emergencies.
- Demonstrate professionalism in your verbal and nonverbal interactions.
- Communicate interest and stay engaged in the discussion.
- Avoid tangents and side discussions.
- Respect space and don't place your notebook or papers all around you.
- Clean up after yourself.
- Engage in conversation with other participants after the meeting.

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11.3.3: The Importance of Meeting Minutes

Each meeting should be documented. Meeting minutes serve as the historical document for the meeting. It is imperative to record the entire meeting, thus you will need to have adequate equipment and materials to accomplish this. For best accuracy, the use of a recorder during the meeting would be beneficial. By using the recorder, pertinent details won't be left out. When interpreting the notes, you should not include your personal thoughts or ideas. You must remain neutral, particularly in relation to a topic of disagreement.

Although you may use a recording device, you will still need to listen carefully and take notes. Completing this step will assist you in combining the information that you had written with the information that you hear on the recording. Writing a draft of the minutes allows you to check for spelling and grammar errors and to read it aloud. Make any necessary corrections and then prepare your final draft. Once the required signatures (if needed) have been obtained, the minutes are ready for dissemination.

As technology evolves constantly, various meeting tools become available. Below is a list of some of those tools. Access the links for additional information:

- [Go To \(formerly GoToMeeting\)](#)
- [Meet—Google](#)
- [Microsoft Teams](#)
- [Zoom meetings](#)

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11.4: Examples of Meeting Minutes

- [11.4.1: Team Dynamics Video](#)
- [11.4.2: Information regarding Team Contracts/Expectancies](#)
- [11.4.3: Sample of an Agenda](#)

- [11.4.4: Sample of Meeting Minutes](#)

11.4.1: Team Dynamics Video



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=626#oembed-5>

11.4.2: Information regarding Team Contracts/Expectancies

[An example of a group contract.](#)

11.4.3: Sample of an Agenda



SkillsUSA State Officers Meeting
Friday, September 10, 20XX
 10:30 a.m. - 12:00 p.m.

AGENDA

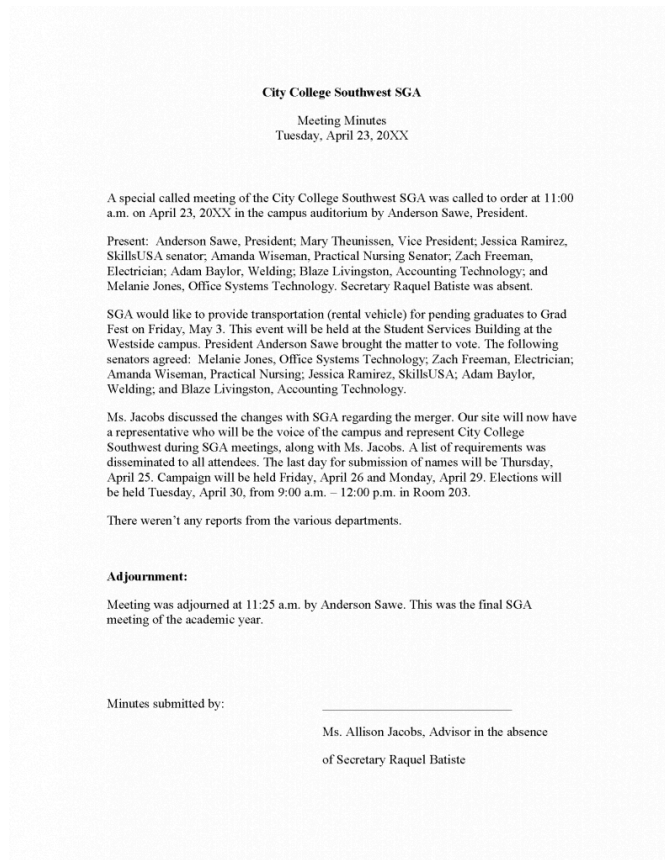
10:30 a.m.	Welcome and Introductions	Jee Yun Nguyen, Past State President
Meeting Objective: To brainstorm goals and themes for State Conference		
10:40 a.m.	New Officer Presentations	Rick McDonald, State Director
10:50 a.m.	Brainstorming and Group Findings	
12:00 p.m.	Next Steps and Adjourn	

NOTES

ACTION ITEMS

This is a sample agenda for a meeting.

11.4.4: Sample of Meeting Minutes



11.5: Practice Makes Perfect!

- [11.5.1: Questions regarding Team Contract \(What-If Scenarios\)](#)
- [11.5.2: Agenda Exercise: Rewrite/Revise](#)
- [11.5.3: Rewrite/Revise Meeting Minutes](#)
- [11.5.4: Agenda Knowledge Quiz](#)

This is an example of meeting minutes.

11.5.1: Questions regarding Team Contract (What-If Scenarios)

At one point in your career, you may be tasked to complete a group or team assignment. Working in a team is a great exercise for real world employment experiences. However, you must be able to work through any issues that may arise to complete the project in a timely manner. Below, you will find some questions that could be found on a typical team contract. Read through each question/scenario carefully. Jot down how you would answer that item. If you have any questions, always reach out to your instructor for guidance.

A group member who is absent from __ meetings will be reported to the instructor.

What are some potential barriers that our group may encounter?

What type of communication will be used for this project? Phone? Text? Zoom? Email?

What roles will each member play for this project: team leader, researcher, note taker, etc.

What will each member contribute (values, expertise, etc.)?

List conflicts that may hinder your team's project completion and how, as a team, can these conflicts be resolved.

What are the rules for the team: attendance, meeting locations, how often will you meet, deadlines, etc.

11.5.2: Agenda Exercise: Rewrite/Revise

Instructions: Thoroughly review the information provided. Using the proper technique/method, revise the information into an agenda. Complete a spelling and grammar check before submitting to the designated assignment area, per your instructor.

A sample agenda that requires revision

Lunch – 12:00 p.m. – 1:15 p.m.

Breakout sessions – 3 of them: Shaping Young Minds (9:30 a.m.), What the Health? (10:45 a.m.) and Diversity 101 (1:30 p.m.)

Registration and Breakfast – 8:00 a.m. – 9:15 a.m.

Vendor spotlights – 8:00 a.m. – 9:15 a.m.; 10:30 a.m. – 10:45 a.m.; 1:15 p.m. – 1:30 p.m.; Vendors include ABC Bank, Trainers Warehouse McGraw Hill, Flatworld, Cengage Learning, Wellburg Mental Health Services, The Diversity Center, Jeff Davis Credit Union, The Well Being Center, and Hunts Brothers.

Guest speaker – Dr. Jessica Winterton; Wellburg University, Jackson Hole, Wyoming; 12:00 p.m. 1:15 p.m.

Wrap and workshop survey: 2:45 p.m.

11.5.3: Rewrite/Revise Meeting Minutes

Instructions: Carefully review the following notes from a committee meeting. Using the proper technique, rewrite the meeting minutes. Complete a spell and grammar check before submitting to your designated assignment area, per your instructor.

Wednesday, September 10, XXXX

Southwind Community College Diversity Committee meeting; Briscoe Building, 2nd Floor, Room 317; 2:00 p.m. start

Present: Samantha Kay, Malachi Sawe, James Abel, DeLayne Alex, Zoie Ramel, Trent Broussard, Lucy Nguyen, Maria Reyes, Robert Landry and Marcus Hall

Lucy – opened meeting. Robert – called roll, Absent – Geoffrey Turin.

Robert read the August XXXX minutes. Motion to accept – Malachi; Zoie seconded.

Lucy – overview of the state’s diversity initiative; asked the group to develop a diversity mission statement that would be in line with Southwind’s mission. Group brainstormed for 30 minutes. A diversity mission statement was developed and will forward it to the college president for approval.

James –spoke about the trainings offered for committee members; will find out if funding is available

James – Diversity, Inc. and Higher Education Conference, November 15 -19, Hyatt Regency New Orleans; spots for 6 people to attend, let James know if you want to attend no later than September 17

Lucy – gave update regarding Spring Faculty/Staff Conference; committee is responsible for 2 ice breakers – 1 in the morning/1 in the afternoon. Asked for volunteers for each session.

Samantha – gave the results of the student survey regarding diversity needs. Positive information gathered.

Lucy – set next meeting for September 25, same place, same time

11.5.4: Agenda Knowledge Quiz

Test Your Understanding: Agenda Knowledge



An interactive H5P element has been excluded from this version of the text. You can view it online

 here:

<https://louis.pressbooks.pub/businessprofessionalcomm/?p=626#h5p-43>

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CHAPTER 12: DEVELOPING PRESENTATIONS

Joseph Williams

Chapter Learning Objectives

1. Identify the different methods of presentation delivery.
2. Identify key elements in preparing to deliver a presentation.
3. Utilize specific techniques to enhance speech delivery.
4. Demonstrate how to methodically plan a presentation.

- [12.1: Introduction and Methods of Presentation Delivery](#)
- [12.2: From Start to Finish: An Example of Planning a Professional Presentation](#)
- [12.3: Choosing and Refining Your Topic](#)
- [12.4: Analyze your Audience](#)
- [12.5: Creating the Draft](#)
- [12.6: Developing a Meaningful Introduction](#)
- [12.7: Developing a Meaningful Conclusion](#)
- [12.8: Developing a Meaningful Slideshow](#)
- [12.9: Contemplating Delivery Particulars](#)

12.1: Introduction and Methods of Presentation Delivery

- [12.1.1: Impromptu Speaking](#)
- [12.1.2: Manuscript Preparations](#)
- [12.1.3: Extemporaneous Presentations](#)
- [12.1.4: Memorized Speaking](#)

Whether you have a marketing presentation coming up for a potential client or a scientific presentation to give to your expert colleagues, you want to be certain your presentation is built on a sound foundation of current concerns and trends your audience will want you to address. As you read this chapter, consider what you might do to win and/or inform a client or supervisor based on your presentation development.

This chapter will help you consider how to organize presentation information and develop a winning strategy for a surefire professional presentation. While knowledge and research on your topic are key to an effective presentation, do not underestimate the importance of organization.

Organization in any presentation is helpful both to you and to your audience. They will appreciate receiving the information presented in an organized way, and being well organized will make the presentation much less stressful for you.

A successful presentation involves flexibility and organization. You know your material. You are prepared and follow an outline. You do not read a script or PowerPoint presentation, you do not memorize every single word in order (though you may memorize some parts), but you also do not make it up as you go along. Your presentation is scripted in the sense that it is completely planned from start to finish, yet every word is not explicitly planned, allowing for some spontaneity and adaptation to the audience's needs in the moment.

Your organization plan will serve you and your audience as a guide. Your plan will also help you present a more effective speech. Just as there is no substitute for practice and preparation, there is no substitute for organization and an outline when you need it the most: on stage.

Delivery is your unique interaction between you and your audience, and delivery is what you are probably most concerned about when giving presentations. This chapter is designed to help you give the best delivery possible and eliminate some of the nervousness you might be feeling. To do that, you should first dismiss the myth that public speaking is just reading and talking at the same time. Speaking in public has more formality than talking. During a speech, you should present yourself professionally. This policy doesn't necessarily mean you must wear a suit or "dress up," but it does mean making yourself presentable by being well-groomed and wearing clean, appropriate clothes. It also means being prepared to use language correctly and appropriately for the audience and the topic, to make eye contact with your audience, and to look like you know your topic very well. Lastly, HAVE FUN with your presentation. Looking like you care about the subject matter, you're comfortable with speaking in general, and you're comfortable with your audience all make a difference in terms of audience perception.

While speaking has more formality than talking, it has less formality than reading. Speaking allows for flexibility, meaningful pauses, eye contact, small changes in word order, and vocal emphasis. Reading is a more or less exact replication of words on paper without the use of any non-verbal interpretation. Speaking, as you will realize if you think about excellent speakers you have seen and heard, should provide a more animated message.

Different speaking occasions call for different delivery methods. According to Engineering professor and author Michael Alley (2013), there are four methods of delivery that can help you balance between too much and too little formality when giving a presentation.

12.1.1: Impromptu Speaking

Impromptu speaking is the presentation of a short message without advance preparation. You have probably done impromptu speaking many times in informal, conversational settings. Self-introductions in group settings are examples of impromptu speaking: “Hi, my name is Steve, and I’m an account manager.” Another example of impromptu presenting occurs when you answer a question such as “What did you think of the report?” Your response has not been preplanned, and you are constructing your arguments and points as you speak. Even worse, you might find yourself going into a meeting and your boss says, “I want you to talk about the last stage of the project...” and you have no warning.

The advantage of this kind of speaking is that it’s spontaneous and responsive in an animated group context. The disadvantage is that the speaker is given little or no time to contemplate the central theme of their message. As a result, the message may be disorganized and difficult for listeners to follow.

Here is a step-by-step guide that may be useful if you are called upon to give an impromptu presentation in public:

1. Take a moment to collect your thoughts and plan the main point you want to make.
2. Thank the person for inviting you to speak. Avoid making comments about being unprepared, being called upon at the last moment, being put on the spot, or feeling uneasy.
3. Deliver your message, making your main point as briefly as you can while still covering it adequately and at a pace your listeners can follow.
4. If you can use a structure, use numbers if possible: “Two main reasons . . .” or “Three parts of our plan. . .” or “Two side effects of this drug. . .” Timeline structures are also effective, such as “past, present, and future,” or geographical structures like “East Coast, Midwest, and West Coast.”
5. Thank the person again for the opportunity to speak.
6. Stop talking (it is easy to “ramble on” when you don’t have something prepared). If in front of an audience, don’t keep talking as you move back to your seat.
7. Smile, even if you’re not feeling like it. A smile shows the audience that you’re in control.

Impromptu presentations are generally most successful when they are brief and focus on a single point.

12.1.2: Manuscript Presentations

Manuscript presentations are the word-for-word iteration of a written message. The speaker maintains their attention on the printed page in a manuscript presentation except when using visual aids. The advantage of reading from a manuscript is the exact repetition of original words. In some circumstances, this repetition can be critical. For example, reading a statement about your organization’s legal responsibilities to customers may require that the original words be exact.

A manuscript presentation may be appropriate at a more formal affair (like a report to shareholders). Your presentation must be said exactly as written in order to convey the proper emotion or decorum the situation deserves.

However, there are costs involved in manuscript presentations. First, it's typically an uninteresting way to present. Unless the presenter has rehearsed the reading as a complete performance animated with vocal expression and gestures, the presentation tends to be dull. Keeping one's eyes glued to the script prevents eye contact with the audience. For this kind of "straight" manuscript presentation to hold the audience's attention, the audience must be already interested in the message and presenter before the delivery begins.

12.1.3: Extemporaneous Presentations

Extemporaneous presentations are carefully planned and rehearsed, delivered in a conversational manner using brief notes that feature "punch" words. Using notes with punch words rather than a full manuscript allows the extemporaneous presenter to establish and maintain eye contact with the audience and assess how well they understand the presentation as it progresses. Without all the words on the page to read, you have little choice but to look up and make eye contact with your audience.

Presenting extemporaneously has some advantages. It promotes the likelihood that you, the speaker, will be perceived as knowledgeable and credible since you know the speech well enough that you don't need to read it. In addition, your audience is likely to pay better attention to the message because it engages both verbally and nonverbally, such as through eye contact. It also allows flexibility; you are working from the strong foundation of an outline, but if you need to delete, add, or rephrase something at the last minute or adapt to your audience, you can do so.

The disadvantage of extemporaneous presentations is that in some cases it does not allow for the verbal and nonverbal preparation that are almost always required for a good speech.

Adequate preparation cannot be achieved the day before you're scheduled to present, so be aware that if you want to present a credibly delivered speech, you will need to practice many times. Because extemporaneous presenting is the style used in the great majority of professional presentation situations, most of the information in the subsequent sections of this chapter is targeted toward this kind of speaking.

12.1.4: Memorized Speaking

Memorized speaking recites a written message that the speaker has committed to memory. Actors, of course, recite from memory whenever they perform from a script in a stage play, television program, or movie scene. When it comes to speeches, memorization can be useful when the message needs to be exact and the speaker doesn't want to be confined by notes.

The advantage of memorization is that it enables the speaker to maintain eye contact with the audience throughout the speech. Being free of notes means moving freely around the stage and using your hands to

make gestures. If your speech uses visual aids, this freedom is even more of an advantage. However, there are some real and potential costs.

First, unless you also plan and memorize every vocal cue (the subtle but meaningful variations in speech delivery, which can include the use of pitch, tone, volume, and pace), gesture, and facial expression, your presentation will be flat and uninteresting, and even the most fascinating topic will suffer. Second, if you lose your place and start trying to ad lib, the contrast in your delivery style may alert your audience that something is wrong. More frighteningly, it will be quite difficult to find your place and keep going if you completely blank out during the presentation. Obviously, memorizing a typical seven-minute presentation takes a great deal of time and effort, and if you aren't used to memorizing, it is challenging to pull off. Realistically, you probably will not have the time to give a completely memorized speech. However, if you practice adequately, your approach will still feel like you are being extemporaneous.

12.2: From Start to Finish: An Example of Planning a Professional Presentation

Congratulations! You have been asked or selected to speak on a topic. Here's one presenter's method for creating a professional presentation.

1. Use a brain drain or mapping to list the concepts under your main topic. The brain drain serves as a “wish list” that you can discuss in a perfect world where there is enough time.
2. Analyze your audience. Who are they? Are they experts, non-experts, or both?
3. What does your presentation intend to do: inform, persuade, or both?
4. How much time do you have? Do you need to leave room for questions? Create a skeletal outline that features a basic order of your presentation subtopics. Consider placing a number of minutes beside each concept so that you have a rough estimate of how long each subtopic will take you. Remember to leave room for a few minutes of introduction and conclusion!
5. Now it's time to research. What do you need to say about each subtopic? Does your subject matter require primary research, secondary research, or both? Are there special thinkers, professionals, or heavy-hitters that you want to include in some of your subtopics?
6. Create a rough draft of your presentation content. You can choose from a chronological pattern, spatial pattern, topical pattern, cause-effect pattern, or problem-solution pattern. Practice your presentation and note the time of each of your sections, whether this includes complete sentences or punch words. Does everything fit where you want it? Is there a natural flow of ideas from one topic to another? If not, feel free to shift content until you get a sense of a natural flow of ideas. Is there any content that does not appear to be inviting to demographic sections of your audience? This is the place for you to objectively remove and replace any content that may be viewed as objectionable or othering.
7. Now it's time to develop your final presentation content. As often as possible, replace complete

sentences with punch words so that you rely more on your memory and expertise (as well as your prowess!) on the subject rather than reading your notes. If there is complex material, never fear: Write those full sentences down!

8. Choose a slideshow format that you feel comfortable with, such as Google slides, PowerPoint, or Prezi. Adjust your content so that less is more—audiences should listen to your presentation and watch you rather than read long content on your slides.
9. Practice until you get the balance right. Then approach friends, colleagues, and family members to try out your material on them. Do they offer recommendations? Consider their advice, but ultimately, you're the boss of your own show.

12.3: Choosing and Refining Your Topic

Let's break it down.

First, think about what your audience will already know about your topic. Conversely, think about what your audience does NOT know about your topic to keep your presentation streamlined and concise. Finally, what information do your audiences need to know in order to be properly informed and/or persuaded?

Write a specific purpose statement, which will be the foundation for everything you say in the speech and a guide for what you do not say. This formula, borrowed from Simon, Grimes, and Roch (2018), will help you in putting together your specific purpose statement:

To _____ [Specific Communication Word (inform, explain, demonstrate, describe, define, persuade, convince, prove, argue)] my [Target Audience (my classmates, the members of the Social Work Club, my coworkers)] _____ [The Content (how to bake brownies, that Macs are better than PCs)].

Example: The purpose of my presentation is to demonstrate for my coworkers the value of informed intercultural communication.

12.4: Analyze Your Audience

Who will be listening to your presentation? Ask yourself the following questions:

- Will audience members be experts in the subject matter, non-experts, or both? What kind of information must be tailored so that experts AND non-experts can follow along?
- What methods do you intend to use to persuade, inform, or both?
- Will a significant portion of your audience be speakers of English as a second language? If so, avoid overuse of humor, metaphors, two-word verbs (such as shut up, shut in, shut out, shut down), and use of slang.

- What kind of action do you want your audience members to take? What will be your methods to win them over?
- Will audience members be objective, indifferent, or hostile about the subject matter? All of the above? Consider what “moves” you want to make to placate those who are not already onboard with your presentation material so that it will further convince them to take action.

12.5: Creating the Draft

[12.5.1: Using Examples and Scenarios](#)

[12.5.2: A Word about Storytelling](#)

To be successful in your presentation, you’ll need two outlines: a preparation outline and a speaking outline. Preparation outlines are comprehensive outlines that include all of the information in your presentation. A presentation outline will consist of the content of what the audience will see and hear.

Eventually, you will move away from this outline as you develop your materials and practice your presentation. Your speaking outline will contain notes to guide you and is usually not shared with your audience. It will summarize the complete preparation outline down to more usable notes. You should create a set of abbreviated notes for the actual delivery. Your organizational model will help determine how you will structure your preparation outline. However, most, if not all, of the organization models will align with this structure:

1. **Attention statement:** An engaging or interesting statement that will cause your audience to sit up and take notice.
2. **Introduction:** Setting out your general idea statement (LINK) and giving the audience an idea of what to expect.
3. **Body:** This section contains your research, main points, and other relevant information. It will follow your organizational pattern.
4. **Conclusion:** Reiterating your idea statement, and/or includes a call to action—what you want the audience to do or think about following your presentation.
5. **Residual message:** This is an optional section but a powerful one. It is the final message you want the audience to remember.

You can use your presentation outline as a starting point to developing your speaking outline. It’s a good idea to make speaking notes to align with each section’s main points and visuals.

12.5.1: Using Examples and Scenarios

Presenters will often use examples and scenarios to help illustrate their message. The main difference between examples and scenarios is that while both help show the audience what you mean, an example is the thing itself; in contrast, a scenario would include more detail about the sequence or development of events. Scenarios also tend to be longer and more nuanced. An example of a sales target might be: to sell 500 units in 30 days. A scenario might be described as: Company A is selling vacuums to the Atlantic Canada region. They are trying to increase their sales and so have set a target of 500 units in the region in 30 days, using a sales incentive program for employees, and promoting a sale at local stores.

12.5.2: A Word about Storytelling

According to Simon, Grimes, and Roch (2018), storytelling can be an effective way to convey your message to your audience. Stories are a fundamental part of the human experience, and if they are well told, they can resonate effectively with listeners. Some of the most inspiring speakers of TED Talks use storytelling effectively in their presentations. You can find out more about how to incorporate storytelling techniques into presentations from the TED Talk speakers directly.

By now you have identified your main points, chosen your organizational pattern, and written your outline, and you are now ready to begin putting your presentation together. But how will you connect your main points together in a relevant manner so that your presentation appears fluid?

Transitions are segues: words, phrases, or visual devices that help the audience follow the speaker's ideas, connect the main points to each other, and see the relationships you've created in the information you are presenting. Transitions are used by the speaker to guide the audience in the progression from one significant concept or point to the next issue. They can also show the relationship between the main point and the support the speaker uses to illustrate, provide examples for, or reference outside sources. Depending on your purpose, transitions can serve different roles as you help create the glue that will connect your points together in a way the audience can easily follow.

Internal summaries: a type of connective transition that emphasizes what has come before and reminds the audience of what has been covered. Examples include: as I have said; as we have seen; as mentioned earlier; in any event; in other words; in short; on the whole; therefore; to summarize; as a result; as I've noted previously; in conclusion.

Internal previews: a type of connective that emphasizes what is coming up next in the speech and what to expect with regard to the content. Examples include: if we look ahead to....; next we'll examine; now we can focus our attention on; first we'll look at; then we'll examine.

Signposts: a type of connective transition that emphasizes physical movement through the speech content and lets the audience know exactly where the speaker is: stop and consider; we can now address; next I'd like to explain; turning from/to; another; this reminds me of; I would like to emphasize.

Time: focuses on the chronological aspects of your speech order. Use of time is particularly useful in a speech utilizing a story, as this transition can illustrate for the audience progression of time: before; earlier; immediately; in the meantime; in the past; lately; later; meanwhile; now; presently; shortly; simultaneously; since; so far; as long as; as soon as; at last; at length; at that time; then; until; afterward.

Compare/contrast: draws a parallel or distinction between two ideas, concepts, or examples. It can indicate a common or divergent area between points for the audience: in the same way; by the same token; equally; similarly; just as we have seen; in the same vein.

Cause and effect or result: illustrates a relationship between two ideas, concepts, or examples and may focus on the outcome or result. It can illustrate a relationship between points for the audience: as a result; because; consequently; for this purpose; accordingly; so; then; therefore; thereupon; thus; to this end; for this reason; as a result; because; therefore; consequently.

Examples: illustrates a connection between a point and an example or examples. You may find visual aids work well with this type of transition: in fact; as we can see; after all; even; for example; for instance; of course; specifically; such as; in the following example; to illustrate my point.

Place: refers to a location, often in a spatially organized speech, of one point of emphasis to another. Again, visual aids work well when discussing physical location with an audience: opposite to; there; to the left; above; below; elsewhere; farther on; beyond; nearby; next to.

Clarification: restates or further develops a main idea or point. It can also serve as a signal to a key point: to clarify; in other words; to put in another way; this means.

Concession: indicates knowledge of contrary information. It can address a perception the audience may hold and allow for clarification: we can see that while; although it is true that; granted that; while it may appear that; I admit that even though.

12.6: Developing a Meaningful Introduction

Introductions are important so that the audience obtains a concise picture of what the rest of the presentation will be about. Keep the audience's attention and pique their interest:

- Express details to keep the audience's attention.
- Put the most important information at the introduction's beginning. This placement will help to "hook" your audience.
- Use one or two of these attention grabbers for an unconventional presentation introduction:
 - Involve your audience
 - Ask a question that requires audience participation
 - Tell a story/anecdote
 - Relate a personal experience
 - Use humor...if the context warrants it

- Create suspense
- Use a quotation or poem
- Use a visual aid
- Give a startling fact or statistic

Your introduction should be up to 5% of your entire presentation. Once you've set the tone and informed your audience what you'll be discussing, segue to the first part of your presentation body.

12.7: Developing a Meaningful Conclusion

Like introductions, conclusions should comprise around 5% of your presentation time. The basic structure of a presentation is not so much linear as it is circular: Speeches should take you in a circle from A to Z. Therefore, your conclusion should take your audience back to the introduction—with an enhanced understanding of the topic. Here are some meaningful cues you can use to signal the eminent closing of your presentation:

- Language cues (“*Now that we have seen that we can solve this problem effectively, we can review the entire situation.*”)
- Movement cues (Physically move back to the center of the room where you began your speech.)
- Paralinguistic cues (Slow your rate of speech and use more pauses.)

Present final appeals to your audience. Depending on the type of presentation you give, you will be asking your audience for something.

- You may be asking them to act in a certain way or to change their attitude toward a certain person or topic.
- You may be asking them to simply understand what you have had to say.
- Leave your audience motivated positively toward you and your presentation topic.
- Stories can make excellent conclusions, as they complete the story that you started in your introduction. You can finish your introduction's story OR you can retell the story; this time the story will reflect what the audience has learned from your presentation.
- If you decide to use humor, make sure that the humor is relevant to the presentation as well as the audience. A little bit of humor goes a LONG way, so don't overdo it. Additionally, inappropriate use of humor is a very bad idea.

12.8: Developing a Meaningful Slideshow

Knowing your audience will give you a good idea of how to adapt your slideshow design. Additionally, ask yourself, “What is my presentation’s goal?” Is your slideshow meant for training employees, selling a new product, or something else altogether different?

Slideshows should have one clear design; otherwise, the design can contribute to the audience’s lack of attention. Correct formatting should have a legible font from the back of a room, non-distractive themes, proper text and graphic alignment, and consistency.

The best visual aids are images that add context to your presentation topic, images that enhance your audience’s understanding of the topic, and informative graphics that are easy to follow. Your visual aids should complement rather than substitute for your presentation content. Ultimately, they should not be the primary focus of the slideshow.

Animation of your transitions can make or break a presentation and should be used sparingly—less is definitely more (and perhaps none at all). Ask yourself the following questions:

- Is this transition animation subtle?
- Does this animation distract from my key points?
- Is this transition animation necessary? Does it enhance my message?

12.9: Contemplating Delivery Particulars

[12.9.1: Presentation Space](#)

[12.9.2: Presentation Timing](#)

[12.9.3: Presentation Clothing](#)

[12.9.4: Gestures, Eye Contact, and Paralinguistic Features](#)

[12.9.5: Pacing and Speed](#)

[12.9.6: Verbal Crutches](#)

[12.9.7: Technical Issues](#)

[12.9.8: Rough Audience Members](#)

[12.9.9: Practice, Practice, Practice](#)

So you’re ready for your professional presentation in terms of content and slideshow. McMurrey and Race (2020) provide some topics outside of your presentation to consider for professional delivery.

12.9.1: Presentation Space

We have presented in good spaces and not-so-good spaces. You have been given access to the room where you will soon give your presentation. Test it out. Consider the venue of your presentation, whether it is in a large

room at an international conference or an 8-seater meeting room in your office. Surely your presentation will be tailored differently depending on size of venue and size of audience.

How would you handle specific problems such as creaky floors, loud projectors, disorganized chairs, and immovable objects that obstruct the audience's view of your slideshow?

- Walk around your presentation space and see if you detect creaky places where you should avoid stepping.
- You need to project your slideshow, but perhaps it becomes apparent that your own voice will have to compete with the loudness of the projector itself...or a particularly loud air conditioning unit. Acknowledge this issue **ONE TIME** to your listeners so that the audience understands that you are doing your best.
- If you have time to clean up the presentation room, such as disorganized chairs and trash, go for it.
- One time I delivered a presentation to a 75-member audience, and a massive concrete column was inexplicably placed to my left, thereby impeding the view of my slideshow for 20% of the audience. If space is limited and chairs cannot be moved, **ACKNOWLEDGE** these audience members: "For those of you who cannot see my slideshow, it is showing X, Y, and Z...."

12.9.2: Presentation Timing

Time each section of your presentation and write out the percentage each section takes. Does your presentation add up? Which parts should be edited for a more streamlined, smooth delivery?

12.9.3: Presentation Clothing

You certainly do not want to try on your presentation outfit at the moment you plan to present, as you will already be nervous. This nervousness is natural and indicates that you're ready to perform! Try on your entire presentation outfit to ensure that you feel comfortable moving and walking effortlessly around in it.

What if you're in the middle of giving a 40-minute presentation and your shoe breaks? **ACKNOWLEDGE** it one time, but don't let it steal your presentation's thunder. Simply remove your shoes and continue with your presentation. Your audience will be on your side, rooting for you. The show must go on!

12.9.4: Gestures, Eye Contact, and Paralinguistic Features

Where are you placing your hands? Are you addressing each side of your audience with eye contact? If you want to take more calculated risks, experiment with such paralinguistic features as pregnant pauses, a contrast in pitch, or a contrast in volume. The more presentations you give in which you address these items, the better you will become at adopting them and adapting your delivery.

12.9.5: Pacing and Speed

Sometimes, oral presenters who are nervous talk too fast. All that adrenaline causes them to speed through their talk, making it hard for the audience to follow. Although it's entirely normal to be nervous, it helps listeners understand you better if you speak a bit more slowly and deliberately than you do in normal conversation. Slow down, take it easy, be clear...and breathe.

12.9.6: Verbal Crutches

Watch out for too much “uh,” “you know,” “okay” and other kinds of nervous verbal habits. Instead of saying “uh” or “you know” every three seconds, just don't say anything at all. In the days before your oral presentation, practice speaking without these verbal crutches. The silence that replaces them is not a bad thing—it gives listeners time to process what you are saying.

12.9.7: Technical Issues

You have begun your presentation, but you soon realize that there are technical problems. Perhaps your projector light burns out or you are suddenly without Wi-Fi during a presentation that requires an online presence. Always have a Plan B, which may include a saved copy of your slideshow on a flash drive or actual handouts of your slide. Alternatively, you can pass out business cards or dictate your email address to your audience, telling your audience before and after the presentation that they can contact you and you would gladly forward them your slideshow and notes. APOLOGIZE ONE TIME. In your career, you will have great presentations and not-so-great presentations. That is part of the process! Muster as much energy and creativity as you can and salvage your technically derided presentation before you eventually close, refer back to your email address, and ask if there are any questions you can answer.

12.9.8: Rough Audience Members

Audiences from both academia and industry comprise mostly of those who wish you to do well. Occasionally, there are those audience members who wish to sabotage your presentation or are simply caught up in their own dramas. Never fear!

- If you have an audience member who interrupts your presentation with asides or questions, thank them and mention that you would happily discuss topics further AFTER the presentation. The same approach can be taken if an audience member intends to tout their own research (and usurp your presentation time).
- If you have a few noisy conversationalists in the crowd, slowly walk up to their table as you continue to

address your presentation materials; generally, this simple walk informs these audience members to quiet down.

- If you have an audience member who wishes to embarrass you in front of your audience in some way, do your best with your responses and your source materials. These interactions are not about you—they are about whatever hang-ups or insecurities the obnoxious audience member has.

These types of irritating audience members are fairly rare; however, it is a real possibility that they will be a part of your own audience. It is always better to strategize ahead of time your own course of action: “If A happens, I will do B.” In that way, you won’t have to flail miserably in response nearly as much if/when these tense moments present themselves.

12.9.9: Practice, Practice, Practice

The first time ANY speech is uttered from your lips, content comes out stilted and awkward. The second time you practice your presentation content, delivery becomes a little bit smoother. By the time you arrive to your seventh or eighth round of presentation practice, you will start varying delivery aspects, and ultimately you will master your presentation and its content.

As you prepare your visuals, look at resources that will help you. There are many rules for using PowerPoint, down to the font size and how many words to put on a single slide, but you will have to choose the style that best suits your subject and your presentation style.

The two videos that follow will provide some pointers. As you watch them, make some notes to help you remember what you learn from them.

The first one is funny: [Life After Death by PowerPoint by Don McMillan](#), an engineer-turned-comedian:



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=635#oembed-1>

You may also have heard about the presentation skills of Steve Jobs. The video that follows is the introduction of the iPhone...and as you watch, take notes on how Jobs sets up his talk and his visuals. Observe how he connects with the audience...and then see if you can work some of his strategies into your own presentation skills. This is a long video; you don’t need to watch it all, but do take enough time to form some good impressions. The following video does not have closed captioning.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=635#oembed-2>

Test your Understanding



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://louis.pressbooks.pub/businessprofessionalcomm/?p=635#h5p-57>

Exercises



1. Ready to get started? Think of a topic that interests you and develop an introduction to a talk about it that follows the guidelines in the chapter for writing an introduction. Try it out on a classmate. Next, take turns asking each other questions about your topic.
2. Design three visuals for your topic, including a title page. Use the Styles and Themes feature in PowerPoint to create a consistent theme for a presentation. How do the visuals affect the mood and topics of your presentation?
3. Find a YouTube video or a tutorial online on how to make good presentations. Share it with classmates by teaching some of the main points in group discussion.
4. In small groups, develop a list of “rules” to follow when you have to give an oral presentation...then create a class list.

5. In a memo to your teacher (or in an online discussion forum) share some of your best practices and ideas for getting through a presentation effectively. Also, share some details from the most horrible presentations you've ever seen or given. Perhaps you can help a classmate avoid making the same mistakes. (I once watched a presentation in which the presenter demonstrated how to sharpen knives. Although there were no injuries, I was on edge the entire time.)

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CHAPTER 13: VISUAL COMMUNICATION

Joseph Williams

Chapter Learning Objectives

1. Learn how to format a basic memorandum for style and content.
2. Learn different sub-genres of various memoranda.
3. Identify key elements of visual rhetoric.
4. Hone basic email skills.
5. Learn how to format a basic report for style and content, including an executive summary.
6. Learn how to incorporate graphics.

- [13.1: What Is Visual Rhetoric?](#)
- [13.2: Basics of Document Design: Formatting](#)
- [13.3: The Five Principles of Design](#)
- [13.4: Integrating Graphics](#)

13.1: What Is Visual Rhetoric?

Typically, you may consider the word “rhetoric” to refer to written text, which is used to persuade, inform, or both. The same can be said about all of the visual communication that we encounter on a daily basis. We are bombarded with scores of visual messages daily: billboards, t-shirt slogans, company logos, the formatting of a document, and everything you can discern in-between. Visuals ultimately have the power to make arguments—to convince, to stir up emotion, or to simply assist an audience in understanding a topic in order to make an informed decision.

Visual rhetoric is important because these visual messages should work in tandem with written messages. When these two types of rhetoric, visual and textual, are in conflict, the audience receives a mixed message and

a confusing one as well. Therefore, it is important for visual rhetoric to complement any accompanying textual rhetoric (or vice versa).

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13.2: Basics of Document Design: Formatting

In order to make your document look professional, it is important to get its visual rhetoric correct; otherwise, the reader will not be guided along, and your document’s message may get lost in the process.

In your life, you will most likely come across a multitude of report and memorandum formats. When there isn’t a preferred company template for you to use, and you have the freedom to choose your document formatting, there are several guidelines to be sure to use.

The Basic Memorandum is as follows.

Memorandum

Date: May 18, 2022
To: Recipient’s First and Last Name
From: Sender’s First and Last Name
Subject: Write something concise here that is brief but informative about memo’s topic

This first paragraph is an introduction, and it can consist of 1–2 sentences: As we will most likely write various memoranda throughout the course of our professional lives, I am writing this memorandum to help you familiarize yourself with its basic structure. Below you will find the basic rules concerning memo format.

Parts of the Memorandum

There are three required elements of the memo:

- **Title:** The title typically consists of the company name and the word *Memorandum*. Make it larger than the rest of your text.
- **Heading block:** The heading block should be double-spaced. Businesses often will ask employees to sign their initials by their name rather than including a signature at the end of the memo as you would in a letter. Many businesses also want the subject line to be capitalized as if it were a title; nevertheless, your subject should succinctly and briefly describe the topic of the message.
- **Body of the memo message:** The body of the message should be single-spaced within paragraphs and double-spaced between paragraphs. In the “block” format, which is most common, every line begins on the left-hand margin, and paragraphs are not indented.

Organization of the Body

The body of the message should be organized in three parts: (1) a statement of purpose, (2) the details, and (3) a positive, friendly closing or next-step information. These three parts are usually presented in three separate paragraphs, though the details themselves may require several paragraphs in a longer, more complex memorandum.

In general, organize your body so that the most important information comes **first**. Avoid making your reader wade through peripheral information before getting to the bottom line. The statement of purpose may well state the conclusion or recommendations as well as announce the topic.

The closing paragraph should be brief and to the point. Draw your conclusions, make recommendations, or define the next step; tell your readers what you want them to do. Whenever possible, close your message in a positive and friendly manner.

Formatting for Visual Effect

Help your reader move through the document quickly and easily by using formatting techniques that break up your memo into manageable packets of information and that visually illustrate the logic of your ideas:

- Use a “reasonable” amount of white space;
- Include instructive or topical subheadings;
- Insert page numbers;
- Use bullet points or numbered lists; and
- Vary typographical elements such as the use of italics, boldface, and capital letters...but don’t use them all at the same time.

Topics for Next Meeting

If you have any questions regarding memorandum format, please notify your professor or supervisor; otherwise, you very well may have just mastered the basic memo format!

Open Technical Communication features some excellent tips in fine-tuning your documentation. If you take a look at your email when you are about to send one, you will notice some other options you have that are related to the olden days of memo writing and letter writing. You have the options of cc. CC stands for carbon copy. You may not be old enough to remember that before copy machines and computers that could print off multiple copies of a document, people used carbon paper to make copies. When a person would write or type, he or she would slip a piece of carbon paper underneath the document, and the striking of the pen or typewriter key would make a duplicate mark on a second piece of paper underneath the carbon paper, hence the term carbon copy. So, the “cc” in the email heading stands for carbon copy, even though we don’t use carbon anymore. In fact, sometimes, the cc is just changed to c for copy.

When do you use the cc option? When you want someone to have a copy of the email, but only for reference purposes. Or to put it more casually, to keep someone in the loop. For example, you manage a team, and you recently had a meeting. You send the meeting minutes to the team members who attended the meeting. You

also want your supervisor to know that (1) you had a meeting and (2) you covered important topics and some decisions are made. Your supervisor isn't necessarily going to respond to the email and isn't directly involved in the meeting or projects. This is a good time to use a cc. When you cc someone on the email, everyone who gets the email can see who is cc-ed.

Your email has a bcc or bc option. Bcc stands for blind carbon copy, and bc is blind copy, but they are the same thing. When you use the bc option, only the person bc-ed can see who gets the email. The person in the "to" box or anyone cc-ed cannot see that a bc copy was sent or who received it. Some people consider the bc option to be unethical. Persons who disagree say that it is appropriate to use the bc option when emailing a subordinate about a difficult matter—a disagreement regarding policy, for example—and you want to make sure your supervisor knows what you wrote. You would bc your supervisor. You don't want your subordinate to think you are "tattling" on him or her, but you do want your supervisor to know what you did in case the matter ends up in his or her office, so he or she is not caught unawares.

People generally agree that using the bc option is appropriate for privacy reasons. For example, perhaps you are an attorney, and you email an insurance company a copy of a client's claim. You might bc the client to ensure the client knows you sent the document and to keep his or her email address private from the insurance company. The insurance company likely assumes that the client will get a copy of the claim or already has one. In another example, as a professor, I might send out an email to my entire class but bc all the students to keep their emails private from each other. With the bc, every student will receive the email, but each student can only see my name as the sender. Or, you might use bc for courtesy. For example, perhaps you have received an email with the hundreds of email addresses that were cc-ed on the original email, and you have to scroll through them to get to the message. It's annoying. If it's not necessary for the recipients to know who received the email—maybe it's just a reminder that the office is closing early today—and you want to avoid the scroll through the cc's, then you can bc all the recipients. That way, there's no cc scroll, and when someone replies, there's no chance that he or she will accidentally hit "reply all."

Finally, in the days of paper, memos also indicated attachments. If a memo arrived on a desk with the notation "Attachment," it meant that there was supposed to be something paper clipped to the memo with additional information. And if the recipient saw nothing paper clipped, something was missing. It is for this reason that you often see in an email a paper clip icon for the attachment button or notification. And because enclosures/attachments are often indicated by paper-clip symbols in an email feed, the "Attachment" note is not used in emails.

The truth is, as you well know, there are lots of different occasions to write emails and memos. And emails and memos have been classified into over 10 different types. In this chapter, we will look at the five most common types—progress report, meeting minutes, incident report, directive, and response to an inquiry. With these five types of memos/emails in your writing arsenal, you should be ready to tackle most memo/email writing tasks.

First, note that progress reports, meeting minutes, incident reports, directives, and responses to inquiry can

be created in many formats—as memos, emails, informal reports, and even formal reports. We will look at these types of documents as memos or emails.

As memos or emails, you will want to start by putting the documents in the correct format. For a memo, you will open up a word processing program, such as Microsoft Word, and you will type the memo header at the top of the document: to, from, subject, and date. You will fill in the information, and then you will begin your memo. If it is a longer memo (longer than a paragraph), you may wish to use section headers. But you do not start the memo with “Dear Mr. Carter” or any other type of salutation.

Note that you also do not sign the memo or end it with any type of closing. After you print the memo, you then initial by your name, and if you are sending the memo format by email (this is not uncommon), then you scan it (unless directed otherwise, it is recommended that you save it as a pdf), and you attach it to the email. The email should alert readers to the contents of the attachment.

If you are sending the progress report by email, then you fill in the email headings—the “to” and “subject” lines. Make sure the subject line is clear: “Progress Report for ABC Project.” You may also have readers to include in the cc lines—persons who need to be aware that you sent the progress report but who may not need to act on it or persons involved in the project who will not respond directly to the progress report but who requested a copy. After you have filled in the headings, you start your email with a greeting and a note letting the readers know what they are receiving. You might write something like the example of an email with a memo attached shown below:

Dear Mr. Carter,

I hope this email finds you well. I have attached the progress report for the ABC project. Please let me know if you have any problems accessing it, or if you have any questions.

Thank you for the opportunity to be involved in this project.

Sincerely,

Mary Lewis, ABC Project Manager

It is assumed that you wrote your progress report in MS Word or another word processing program so that you could run spell check and save the document on your own computer. So, when you are ready to send it via email, you copy it into the open email form. Proofread it to make sure the copy happened correctly, and then hit “submit.”

Progress Reports

A progress report is much like what it sounds like. It lets your supervisor know the status of an ongoing project. Let’s say you work for a company that serves clients by creating web pages for middle school sports

teams. But because you are very good at writing and designing documents, you have been put in charge of an annual project—the company newsletter. This newsletter comes out once a year around the holidays, and it’s really a feel-good piece sharing the wonderful things your company has done all year. It’s important, but maybe not a high-stress or high-dollar task that you are in charge of. Nevertheless, you are expected to work on it with your team all year and submit quarterly progress reports to your supervisor. Therefore, each quarter you will prepare your progress report on the team meetings, what is planned, what has been done, and what will be done. You also list any problems you are having or any you foresee. This last part is very important. While on the one hand, you don’t want a progress report that reads like a disaster report, on the other hand, you do want to prepare the reader for any upcoming problems. This preparation is especially important if something really might be delayed or over budget. You don’t want to submit perfect progress reports and then suddenly your supervisor finds out the project is behind schedule!

Of course, the stakes become higher if a progress report is about a high-pressure task. If, for example, your team is in charge of the new renovations on the parking deck, and those renovations are behind, you want to let your supervisor know as soon as possible in the progress report so that he or she can prepare for things like letting his or her supervisor know that there is a delay, extending the rental on the parking lot that has been used while the deck is built, and moving the cleanup crew’s scheduled work dates back until they are actually needed, as well as a host of other things that will be impacted by a change in timeline.

Something related to a progress report is a status report or status update. While a progress report reports upon the progress of a single project, a status report is a report on the status of your entire unit or department—it can encompass a range of projects and activities, and it is usually submitted at regular intervals (monthly or quarterly) regardless of what projects are underway.

Meeting Minutes

For most meetings, notes are kept regarding what important topics were brought up in the meeting and what important decisions were made. These notes are often kept on file so that people can look back through them if questions arise about, for example, important votes or discussions about topics. These notes are called meeting minutes. Sometimes a secretary is appointed to always take minutes. And sometimes the duty rotates among attendees. The minutes are then “written up,” which is a common term for preparing them to share with the group. Meeting minutes take a particular form, whether they are distributed via memo or email. The header includes the organization’s name, the date and location of the meeting, who was present, and the meeting leader and the person taking the minutes. They also include the time the meeting started and the time the meeting ended.

Meetings have an agenda that is usually distributed before the meeting. Many times, people taking minutes for a meeting like to pull up the agenda on their word processing program and take the minutes right on that agenda so that they know they are using the original wording of the topics as they are presented to the group.

Most importantly, as mentioned above, minutes include what happened during the meeting, including who presented on main topics and who brought forth and seconded votes and what decisions were made. It’s important not to make the minutes a “play by play” of conversations, and especially don’t get bogged down in

the details. Just make sure to take down the main points. If a heated discussion breaks out, don't put that in the minutes. Just note that the topic was discussed and note the resolution, if any, or if the topic was tabled (that is, put on hold for another time). You want to portray the organization positively, and for that reason, avoid recording squabbling or other human behavior that is normal but that is not beneficial to preserve in meeting minutes.

Incident Reports

Incident reports are written by police officers, security personnel, and anyone who was involved in an incident or accident. As you can see from the story of [Police Constable / Police Dog Peach](#), incident reports (here in the form of a witness statement) often are forms one fills out. Even so, it is important to secure the correct form and make sure that you fill in the requested information. Usually there is a portion of the form where you are asked to tell what happened—provide the narrative of the event. You will want to double-check all information before you commit it to the incident report, which is a legal document. You may have to look up the names and titles of persons also involved. You also want to make sure the date is correct and any equipment names or room numbers are correct. Do not write what you THINK happened. Write where you were and what happened to you or what you saw. Explain what happened after the incident as well. How did you handle it? What did you do? Also, be very clear and avoid any language that might not be understood by people outside your field. Instead of saying you reached for the bandages, but they were “86” (slang for “out of”), say there were no bandages in the first-aid kit. Be honest. Dishonest information can put your job in jeopardy or inhibit your ability to receive medical treatment or compensation for an incident/accident.

You do not (and likely should not) make judgments about who is at fault, and I would advise you not to admit that you were at fault or did something wrong. After all, that judgment is better made by someone who can see a bigger picture than you can. Instead, report the facts as clearly as possible.

If there is no form to fill out, then organize your narrative chronologically. Use paragraph breaks at logical points to make it easier to read your report. In incident reports, because perhaps a person was hurt or property was damaged, it's very important to make sure your grammar and spelling are correct. As you probably know, problems in language clarity can create legal problems that, again, might impede your ability to receive medical treatment or compensation for an incident/accident.

Directives

You send out emails and memos for a variety of reasons—usually to distribute information. Sometimes, you want to let people know that tomorrow is doughnut day, and so you might send out a short email such as “Hello Everyone! Just a quick reminder that tomorrow is doughnut day!” Such an email is appropriate because everyone knows what doughnut day means—Joan in marketing will be bringing in some yummy doughnuts to share. And it's probably okay to be that informal because it's also not an official event that requires action on the employees' part. But what if tomorrow is the annual blood drive? That event may require more explanation, especially since new employees (hired since the last blood drive) may not be aware of the company's long-standing support of the local blood bank. It may also be nice to remind everyone of the positive impact this event has on the local community and how Roger, from Accounts, has a daughter who

has a health condition that frequently requires blood transfusions (assuming Roger is okay with sharing that personal information). On more than one occasion, the local blood bank has been able to provide that blood because the company's support helps to make sure they have the resources they need on hand.

Such an email or memo would first start with the announcement of this year's blood drive, a reminder to drink a lot of water and eat a meal before donating, and then name the date, time, and place. Then the memo/email might move into some of the history of the blood drive at the company and present the facts about last year's effort—the number of participants and pints collected. And then end with “I encourage everyone who is able to show up to support the blood drive.”

This common type of email/memo is an informational email/memo. A directive is a little different, and it has a slightly different organization. The directive is not a piece of general information but, as its title makes clear, presents directions that direct readers to follow a particular procedure or policy.

Unlike the general information memo, a directive generally starts with the rationale behind the directive so that people feel that it is a reasonable request and also to help people remember it. It then ends by stating the policy or procedure that readers are directed to follow. For example, let's say that for security reasons, the janitorial staff will no longer be allowed access to employee offices. Instead, employees will put their trash cans outside their offices on Mondays, Wednesdays, and Fridays for the janitorial staff to empty. Employees will then put their trash cans back in their offices the following morning. This is a new practice, so you want to issue a directive.

First, you explain the situation. You don't want to give too many details because you don't want to encourage similar incidents, and you don't want to cast suspicion on any particular employees, but you do want to provide enough details so that employees understand the rationale behind this policy. You might write that in the past two weeks, a few employees have entered their offices in the mornings to find their computers on. A forensic investigation confirms that the computers were tampered with. As an extra precaution, the janitorial staff will no longer have access to the employee offices. This step is taken to help narrow down who might be responsible for these incidents. At this point, it is not clear if any sensitive information was stolen, but you will let the employees know as soon as any information becomes available. You might also ask everyone to change his or her passwords now for extra security and to remember not to leave passwords written down and lying around their computers.

You end with the directive: effective immediately, employees are directed to place their trash bins outside their office doors on Mondays, Wednesdays, and Fridays at 5 p.m. The bins are to be put back in the offices on the following business morning. The janitorial staff will no longer enter your offices to empty your trash.

So that's it. A directive is different from a general information memo in that it involves a policy or procedure, and it generally starts by providing an explanation and ending with the new policy or procedure that is being implemented.

Response to an Inquiry

Our final type of memo/email is the response to an inquiry. Most of the memos/emails you send will be informational or a response to an inquiry.

Response to an inquiry memos/emails address a question or series of questions—perhaps about an action, a product, or a policy. Perhaps a customer wants to know why something doesn't work. Perhaps your supervisor wants to know his computer has not yet been updated. Perhaps your team member wants to know what the policy is on splitting up vacation days into half days. Whatever the case, you are responding to an inquiry.

To begin your response, especially if you are responding to a client, you might thank the writer for purchasing your product or for being a loyal customer or client. Keep in mind, this person took time out of his or her day to write you, so it was important. And the person may be out of patience if the inquiry is in relation to a malfunction. If the inquiry is from a colleague, you might begin with “It's nice to hear from you” or another polite phrase.

Next, provide the answer to the question. If there are multiple questions, and if they are numbered, number your responses the same way for clarity. For example, if question 3 is “The directions say to put tab A into slot B, but I can only see tab A and slot C,” then you might answer, “3. Please turn the paper doll over. Slot B is on the side opposite slot C.” Also, if there is a website that provides information that you think might be helpful, mention the website and provide the link. Be sure to double-check the link to make sure it is correct.

If you cannot answer the question, either because you don't know the answers or because you are not allowed to divulge the requested information (perhaps it is a company secret or proprietary), let the reader know. Close the email/memo with an offer to assist with other requests or answer further questions.

Please keep in mind that if it is your job to answer questions on the topic of x, then it doesn't look good if you say, “I don't know the answer to that question on the topic of x” and end the email/memo. Such a response will sour a customer on your brand very quickly. Just yesterday, I heard a story of a person to whom all responses to inquiries were met with “I don't know.” It certainly is easier to do business that way—and it is a real time saver to just have one standard response. But when you don't answer people's questions, they turn to other people. And they quickly learn that the person with no answers really isn't serving any purpose in the office. The person mentioned above lost her job right before Christmas. The moral of this story is that if it is your job to answer questions on the topic of x, then you should find the answer. Ask a colleague or supervisor to assist you. And if it is someone else's job to answer the question on the topic of x, privately (in person, by phone, or in a separate email) ask that person if it is okay if you forward the question to him/her. You don't want to just automatically shove your emails off on other people—such actions may also cost you your job. Finally, if it is not your job to answer the question on the topic of x, and you have permission to forward the inquiry to the person whose job it is, then ask the person making the inquiry if it is okay if you forward his/her correspondence to the correct person. Then, if you have permission, do so. It is never okay to just forward email without permission.

Finally, always be polite and practice the “you” attitude. Think about how it must feel to need information—and to perhaps be frustrated. It's true, you might be frustrated, too, at the questions that you feel are silly or repetitive, but still have empathy, be polite, and offer to assist with other questions or requests.

Let's take a look at a Basic Report, which is as follows:

**Examining a Basic Report Format:
Components to Assist Students in Their Assignments**

Prepared for

Names of Your Report's Audience Here

Prepared by

The Sender's First and Last Name

May 18, 2022

Table of Contents

In order to allow your audience to preview the report's structure, you will include a Table of Contents here.

Your entries are going to match the report's headings in an easily scannable format. As always, take your readers by the hand and guide them through your document.

Executive Summary

The first paragraph of your Executive Summary identifies your research purpose. Over the past 3.5 years in teaching Business Communication, I have become aware that there are many students who are unfamiliar with the basic outline of an informative business report. One way to counter this lack of familiarity is to provide a template so that audiences can refer to a basic outline and apply what they have learned. In order to facilitate the acquisition of this basic skill, I am providing this template here for you. Ultimately, the Executive Summary should take up one page.

Formatting and Basic Content of Report

Provide details in order to build your credibility. This basic report format shows how to organize your basic report components. Several professional sources have been consulted, namely contemporary textbooks, in order to provide you straightforward, succinct information that is easy to digest. It is my belief that by methodically isolating each section and providing you with details of the assignment at hand, you will be able to ace this part of your grade.

Findings

In this part of your Executive Summary, what were your findings from your assignment? Remember to use ample (but not TOO ample) white space, subheadings, page numbers, and bullets / numbered components so that your document is easy to skim and scan. Also remember to label your graphics as figures. I suspect that your findings will generate almost half a page right here in this section.

Recommendations

The recommendations are the final component of your one-page Executive Summary. They comprise one paragraph, 2–3 sentences, that previews the recommendations but minimizes them to prevent an immediate, possibly resistant reaction.

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13.3: The Five Principles of Design

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- [13.3.2: Alignment](#)
- [13.3.3: Contrast](#)
- [13.3.4: Consistency](#)
- [13.3.5: Balance](#)

Johnson-Sheehan (2015) proposes five principles of design for consistency in professional documentation. If your document adheres to these five principles of design, then your audience will be able to move effectively from point to point—or even skip around so that they can find the specific materials that they find relevant. (Different audience members may very well be looking for different items.)

13.3.1: Grouping

Images and words that are related to each other should be grouped near each other on a page. Therefore, the reader will assume a relationship due to proximity of subject matter.

13.3.2: Alignment

Your document does not appear professional without an inherent hierarchy; otherwise, audiences become easily confused as they search to see the importance and relevance between different topics. Align your images and words horizontally or vertically in order to show structure.

13.3.3: Contrast

Items in your document that are different should look significantly different. Your readers should be able to discern different items in your document via color, shading, highlighting, and changes in font sizes.

13.3.4: Consistency

Design features in the document are used consistently so that your document looks uniform. These features, such as headings, placement of page numbers, and different sets of lists or tables, should be predictable in nature so that your reader is guided through your document effectively.

13.3.5: Balance

Your document should show balance left to right as well as top to bottom. According to Johnson-Sheehan, “To balance a text, imagine your page features should offset each other to create a feeling of stability.” Did you place something on the left side of your page? Then most likely you should additionally place something on the right side of the page.

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13.4: Integrating Graphics

According to Markel (2010), the effective integration of visual elements to a technical document requires the following steps:

1. Use the design principle of grouping to place the graphic in close proximity to the relevant point in the discussion as closely as possible.
2. Introduce the graphic before it appears in the text using “See Figure 1” or “See Table 2.”
3. Explain the graphic in the text, as text and graphic must be integrated. A note can be provided with the label and title to explain the visual when needed.
4. Graphics should be clearly visible and complement (not replace) text.
5. Graphics should be labeled, titled, and sourced.

6. Graphic sources are included within References / Works Cited page.
7. Create a list of figures for accessibility if more than four or five graphics are used.

As you review your research and begin to think about possible visuals to include in your report, take the advice from the team at Howdy or Hello? The first step is to consider which graphics are most appropriate given the data you wish to convey. The table below provides some general guidelines on the kind of graphic most suitable given the type of information.

Information to Convey	Visual Type
Numbers, percentages, categories	Tables, charts
Processes	Flow charts
Geographic data	Maps
Chronological or prioritized lists	Numbered lists
Non-chronological lists	Bulleted lists

When creating graphics, it is important to keep your audience in mind. This relates not just to the content you share but also how that content appears on the page. For example, one color alone can have different meanings across different cultures. The color red means “power, passion, danger” in the USA, but it means “religion” in Latin America, “mourning” in South Africa, “purity” in India, and “happiness, luck” in Southeast Asia. Similar differences exist across cultures with other colors, too, so be aware that the choices you make for your graphics may communicate ideas you do not actually intend.

Explore Visme’s Infographic Dos and Don’ts here:



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://louis.pressbooks.pub/businessprofessionalcomm/?p=652#oembed-1>

Devise some methods in order to make an unstoppable infographic on the topic of your choice...and then create it!

Watch Lea Gaslowitz’s video on how to spot a misleading graph here:



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Take notes and think of ways in which you can improve upon her examples for more ethical representations.

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Test your Understanding



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<https://louis.pressbooks.pub/businessprofessionalcomm/?p=652#h5p-58>

Exercises



1. Discuss texts that you have found to be intimidating or hard to read due to their layout or appearance. What exactly has made these texts difficult to read, and how would you suggest to make them better?
2. Surf a company website and analyze it for the five principles of design.
3. On campus or at your workplace, locate a poorly designed document. In a practice memo addressed to your professor, critique the document in terms of design principles or basic document formatting.
4. Locate a graphic on the web that you suspect would not be appropriate for an international audience. In a practice memo addressed to your professor, methodically analyze the graphic and state your reasoning.

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CHAPTER 14: INTERCULTURAL COMMUNICATION

Joseph Williams

Chapter Learning Objectives



1. Understand culture as a construct.
2. Consider readers and colleagues from other cultures.
3. Explore relationships between cultures.
4. Reconsider your perspective about culture and how it affects your writing process.
5. Learn how to acknowledge cultural differences through frameworks.

Intercultural Communication Topics

- [14.1: What Is culture?](#)
- [14.2: Understanding Cultural Context](#)
- [14.3: Deepening Cultural Understanding](#)
- [14.4: What Is Intercultural Communication?](#)
- [14.5: Ethnocentrism + Stereotypes](#)
- [14.6: Concepts of Face](#)
- [14.7: Cultural Dimensions](#)

- [14.8: Monochronic vs. Polychronic Time](#)
- [14.9: Common Language Issues](#)
- [14.10: Slang + Colloquialisms](#)

14.1: What Is Culture?

Let us begin with this working definition:

Culture consists of the shared beliefs, attitudes, behaviors, values, and assumptions shared by an identified group of people.

As you work through this chapter, remember these five things about culture as listed in Merck's *Technical Communication*:

1. **It is learned.** Geert Hofstede views culture as consisting of mental programs, calling it *softwares of the mind*, meaning each person “carries within him or herself patterns of thinking, feeling, and potential acting which were learned throughout their lifetime.” Similarly, Peter Senge argues that mental models lock individuals and groups into a specific perception about the world. Like a computer, we are programmed to act or behave in certain ways. The conscious and unconscious learning we undergo, over time, turns into beliefs that we consider to be valid. We then teach each other that these beliefs are cultural norms, and they are then expressed in our daily lives as behaviors and actions.
2. **It is shared.** Although you may think of yourself as an individual, you share beliefs, rituals, ceremonies, traditions, and assumptions with people who grew up or live in similar cultural backgrounds. It is easier for you to relate to someone who has shared value systems and ways of doing things than someone who does not share the same values. The patterns of culture bind us together and enable us to get along with each other.
3. **It is dynamic.** Culture is dynamic and thus complex. Culture is fluid rather than static, which means that culture changes every day in subtle and tangible ways. Because humans communicate and express their cultural systems in a variety of ways, it can be hard to pinpoint exactly what cultural dynamics are at play. It is important to pay attention to the cultural context of a communication to understand the depths of its dynamic properties.
4. **It is systemic.** In systems theory, systems are interrelated interconnected parts that create a whole. There are patterns of behavior, deeply rooted structural systems, which are beneath the waterline. What we see at the top of the iceberg are the behaviors; we do not see what contributes to those behaviors. To address the system, one must be able to address the underlying patterns. These patterns, because they are deeply embedded in the system, will take up significant effort, time, and resources. Changes to the system are slow and gradual; visible changes may not appear until months, or even years, later.
5. **It is symbolic.** Symbols are both verbal and nonverbal in form within cultural systems, and they have a unique way of linking human beings to each other. Humans create meaning between symbols and what

they represent; as a result, different interpretations of a symbol can occur in different cultural contexts.

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14.2: Understanding Cultural Context

Before you move forward in addressing other cultures, take a quick survey to see where you identify individually. Erin Meyer, in her 2014 book *The Culture Map: Breaking through the Invisible Boundaries of Global Business*, explores not just expectations and understandings informed by culture but also how different cultural context thresholds affect transcultural communication.

For starters, you might take Meyer’s self-assessment questionnaire: [What’s Your Cultural Profile](#).

Now that you have a partial idea of your cultural profile, take a moment to watch these two videos. First, in this YouTube video, Meyer discusses context: [“Low Context vs. High Context Societies.”](#) Next, view this video from Meyer’s web page that discusses “upgraders” and “downgraders” and their role in culture and disagreement: [“Lost in Translation.”](#)

As Merck mentions in *Technical Communication*, we often conduct a piece of communication for a given reader, but how often do you think about the primary reader’s culture? What would you change in the communication if the reader has a different cultural threshold? How much thought do you put into colors, layout, and language? Are there different instances where you need to build a relationship or be more direct, more visual?

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14.3: Deepening Cultural Understanding

Give yourself a little test with a little help from Rentz and Lentz (2021): How much do you actually know about the following individuals that live all over the United States?

- A young man wearing long side curls and a yarmulke
- A young woman wearing a hijab
- A fortysomething Caucasian man driving a pickup truck and wearing a John Deere ballcap
- A person using sign language to communicate
- A person wearing a gay pride t-shirt

A common Arabic phrase translates to “Not all of my fingers are the same.” This phrase celebrates diversity and warns against the idea that everyone from a certain culture will act and react similarly. People in any country who identify with a particular culture will do so to varying degrees. In technical writing, it is further

important to understand cultural communication because, like other cultural systems, organizational culture controls the behavior, values, assumptions, and beliefs of organizational members. It is a combination of organizational members' own beliefs and the values, beliefs, and assumptions of the organization. It is the role of the organizational leader, as a change agent, to help create a positive organizational culture that meets the demands of a competitive environment, board and shareholder expectations, and employee career satisfaction.

As a professional communicator in contemporary society, you need to be aware that the very concept of community is undergoing a fundamental transformation.

Intercultural and international business communication has taken on a new role for students as well as career professionals.

Global business is more than trade between companies located in distinct countries; indeed, that concept is already outdated. Intercultural and international business focuses less on the borders that separate people and more on the communication that brings them together. Business communication values clear, concise interaction that promotes efficiency and effectiveness. You may perceive your role as a communicator within a specific city, business, or organization, but you need to be aware that your role crosses cultures, languages, value and legal systems, and borders.

However, it is important to know we are still working with human constructs. From the building we erect that represents design values to the fences we install that delineate borders, our environment is a representation of culture, but it is not all that is culture. Culture involves beliefs, attitudes, values, and traditions that are shared by a group of people, as well as the psychological aspects of our expectations of the communication context.

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14.4: What is Intercultural Communication?

In defining intercultural communication, there are eight components of communication to work with, and yet the writer still must represent holistic meaning. It may be tempting to consider only the (1) source and (2) receiver within a transaction as a representation of intercultural communication, but doing so could mean missing the other six components—(3) message, (4) channel, (5) feedback, (6) context, (7) environment, and (8) interference—in every communicative act. Each component influences and is influenced by culture. Culture is represented in all eight components with every communication. In this context, all communication is intercultural.

It may be tempting to think of intercultural communication as interaction between two people from different countries. While two distinct national passports may be artifacts, or nonverbal representations of communication, what happens when two people from two different parts of the same country communicate? From high and low Germanic dialects, to the perspective of a Southerner versus a Northerner in the United States, to the rural versus urban dynamic, geographic, linguistic, educational, sociological, and psychological traits influence communication. It is not enough to say that someone from rural Southern Chile and the

capital, Santiago, both speak *Castellano* (the Chilean word for the Spanish language) so that communication between them must be intracultural communication, or communication within the same culture. What is life like for the rural Southerner? For the city dweller? Were their educational experiences the same? Do they share the same vocabulary? Do they value the same things? To a city dweller, all the sheep look the same. To the rural Southerner, the sheep are distinct, with unique markings; they have value as a food source, a source of wool with which to create sweaters and socks that keep the cold winters at bay, and in their numbers they represent wealth. Even if both Chileans speak the same language, their socialization will influence how they communicate and what they value, and their vocabulary will reflect these differences.

Take this intranational comparison a step further. Within the same family, can there be intercultural communication? If all communication is intercultural, then the answer would be yes. Imagine a three-generation family living in one house. The grandparents may represent another time and different values from the grandchildren. The parents may have a different level of education and pursue different careers from the grandparents; the schooling the children are receiving may prepare them for yet another career. From music, to food preferences, to how work is done may vary across time; Elvis Presley may seem like ancient history to the children. The communication across generations represents intercultural communication, even if only to a limited degree. But suppose you have a group who are all similar in age and educational level. Do gender and the societal expectations of roles influence interaction? Of course. (Revisit the first **Try This** from “Deepening Cultural Understanding.”) And so among these students not only do the boys and girls communicate in distinct ways, but also not all boys and girls are the same. With a group of sisters, there may be common characteristics, but they will still have differences, and these differences contribute to intercultural communication. We are each shaped by our upbringing, and it influences our worldview, what we value, and how we interact with each other. We create culture, and it creates us.

Culture is part of the very fabric of our thought, and we cannot separate ourselves from it, even as we leave home, defining ourselves anew in work and achievements. Every business or organization has a culture, and within what may be considered a global culture, there are many subcultures or co-cultures. For example, consider the difference between the sales and accounting departments in a corporation. We can quickly see two distinct groups with their own symbols, vocabulary, and values. Within each group, there may also be smaller groups, and each member of each department comes from a distinct background that in itself influences behavior and interaction. Now, change that context to a piece of communication leaving your computer. Who will read it? Who could read it? What will your colleagues or readers of another culture take from it—intended or not?

Sometimes, the focus of technical communication is quite easy; the primary reader is clearly targeted through demographic research. But think about how much more effective, more dynamic, a communication could be if the writer considered the potential cultural perspectives at work when the document is read.

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14.5: Ethnocentrism + Stereotypes

Jandt (2016) notes that ethnocentrism is a barrier to effective intercultural communication. To be ethnocentric is to believe in the superiority of one's own culture. On one hand, it is normal to believe that one's own culture is "better" or better at performing numerous tasks—perhaps in terms of government policies, health care practices, and even the "right" way to chop vegetables. After all, our own culture is oftentimes our only point of reference. Nevertheless, there is a **WHOLE WORLD** out there that feels the same way as you do. Rwandans feel like their way of life is the "right" way, as do Qataris, Fijians, and Chileans. Who is right? Who is wrong? There is more than one way to get something done, and it would behoove you to look at yourself in the mirror and attempt an open mind for other ways of doing things and other belief systems.

Extreme ethnocentrism leads to a rejection of the richness and knowledge of other cultures. It impedes communication and blocks the crucial exchange of ideas and skills among people. Because it excludes other points of view, an ethnocentric orientation is restrictive and limiting.

When creating graphics, it is important to keep your audience in mind. This relates not just to the content you share but also to how that content appears on the page. For example, one color alone can have different meanings across different cultures. The color red means "power, passion, danger" in the USA, but it means "religion" in Latin America, "mourning" in South Africa, "purity" in India, and "happiness, luck" in Southeast Asia. Similar differences exist across cultures with other colors, too, so be aware that the choices you make for your graphics may communicate ideas you do not actually intend.

Jandt notes another stumbling block to intercultural communication: stereotypes, which are sweeping judgments based on group membership. Anyone can stereotype and anyone can be the subject of being stereotyped. Stereotypes are harmful in three different ways:

1. They cause us to assume that a widely held belief is true when it may not be.
2. Continued use of the stereotype reinforces and perpetuates the belief.
3. Stereotypes can become a "self-fulfilling prophecy" for the person stereotyped.

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14.6: Concepts of Face

Neuliep (2021) discusses the concept of face as founded by Stella Ting-Toomey. Ting-Toomey and others argue that persons in all cultures have face concerns. Face represents an individual's sense of positive image in the context of communication. Everyone in all cultures has face concerns during conflict. "Losing face" is feeling shamed and overtly noted as "being wrong" in a situation, oftentimes causing grave embarrassment. Additionally, "saving face" is the act of regaining ground in a conflict and avoiding losing face. Most of us daily ensure that someone does not lose face within our daily negotiations, hence we assist in others saving face.

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14.7: Cultural Dimensions

- [14.7.1: Individualism vs. Collectivism](#)
- [14.7.2: Power Distance](#)

Geert Hofstede (2010) developed a well-known model in order to describe behavioral patterns among cultures. His model consists of several cultural dimensions, namely Individualism vs. Collectivism; Power Distance; Masculinity vs. Femininity; Uncertainty Avoidance; Long-Term vs. Short-Term Orientation; and Indulgence vs. Restraint. While all of these dimensions, heavily lauded and heavily criticized, have their merits for consideration, we will focus on the first two for our purposes.

14.7.1: Individualism vs. Collectivism

Jandt notes that this dimension refers to the way people define themselves and their relationships with others. In highly individualist cultures, such as those found in the global north and northern Europe, people look well after themselves and their immediate families. When meeting a new person in individualist cultures, you want to know what that person DOES. You tend to define people by what they have done, their accomplishments, what kind of car they drive, or where they live. In individualist cultures, goals are set with minimal consideration given to groups other than perhaps the immediate family.

Highly collectivist cultures, such as those found in many Asian and South American countries, emphasize relationships among people to a greater degree. Collectivist cultures stress interdependent activities and suppress individual aims for the group's welfare. People are integrated into strong, cohesive in-groups that oftentimes continue throughout a lifetime.

Individualism and collectivism are associated with direct and indirect styles of communication. In the direct style found in individualist cultures, the speaker's wants, needs, and desires are embodied in the spoken message. For example, if an individualist wants a window closed within a classroom, they may overtly state, "Please close the window." On the other hand, in the indirect style of the collectivist, the speaker's wants, needs, and goals are not obvious, and the recipient needs to "read between the lines." For example, if a collectivist wants the same classroom window closed, they may state, "It sure is cold in here." The recipient is to glean understanding that the speaker wants the window closed.

The more we learn about differing communication styles, the better we become at navigating them for mutual benefit between the speaker and the recipient.

14.7.2: Power Distance

Jandt (2016) states that power distance is the way in which different cultures deal with inequality, such as superiors vs. subordinates. Hofstede believes that power distance is learned early in families. In cultures with high power distance, such as Qatar, China, and Thailand, children are expected to be obedient toward parents and adults rather than being treated as more or less equals. Additionally, people are expected to pay high respect to those of higher status, such as a professor, a politician, or a supervisor. Cultures with high power distance have power and influence concentrated in the hands of a few rather than distributed throughout the population. Conversely, cultures featuring lower power distance, such as Sweden, Germany, and Canada, treat their population more like equals. In low power distance universities, there isn't a problem with students questioning their professor's lecture details. Additionally, bosses are treated more like someone to work with rather than a father figure to look up to.

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14.8: Monochronic vs. Polychronic Time

Rentz and Lentz (2021) note that those from monochronic cultures such as the US, Japan, and the Netherlands tend to be monochronic in that they regard time as something that must be planned in order to be used as efficiently as possible. They strive to meet deadlines, to be punctual, and to work on schedule. Conversely, other cultures such as those found in India, Brazil, and Turkey are polychronic and view time in a more relaxed way. In business negotiations, the people in these cultures move at a deliberate pace, engage in casual talk before getting to the main issue, and value relationships over efficiency.

Use of Space

Rentz and Lentz (2021) also note that people from different cultures manage their personal space differently. In southern Europe and Latin America, for example, communicators may stand closer than what is considered "normal" in the global north. To take another example, those people from the UK, Sweden, and Japan will stand orderly in line and wait their turn, while people from France, China, and India tend to jostle for space when boarding trains, standing at ticket counters, or shopping.

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14.9: Common Language Issues

- [14.9.1: Two-word Verbs](#)

Rentz and Lentz (2021) list two of the more troublesome areas for non-native speakers of English as the use of two-word verbs and colloquialisms. As you attempt to communicate with non-native speakers, it would be a good idea not to overuse the following two components.

14.9.1: Two-word Verbs

Two-word verbs are phrasal verbs that consist of the verb proper as well as an additional component, which is oftentimes a preposition. Think about the stark differences between look up, look out, look down, and look around.

14.10: Slang + Colloquialisms

These can also cause problems when your reader or listener is not familiar with them. Think about all of the sports metaphors we use: “Hayden hit a home run on his final exam!” “I need to call time out on our argument.” “Johara aced her parallel parking on her driver’s test.” Furthermore, in the US, we use colloquialisms every day. They are colorful and fun to use, but they may cause a great deal of confusion for non-native speakers. Rentz and Lentz (2021) offer up some great examples to follow for your intercultural communication:

Don’t use this phrase	Use this phrase instead
This is just off the top of my head.	Here’s a quick idea.
He frequently shoots from the hip.	He frequently acts before he thinks.
They couldn’t make heads or tails of the report.	They couldn’t understand the report.
The sales campaign was a flop.	The sales campaign was a failure.

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Watch Chimamanda Ngozi Adichie’s TED Talk about the single story here:



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Take notes of her comparison/contrast of Nigeria vs. the USA. What did you learn?

Watch the following videos that discuss Indian head-nods. Which did you like the best...and why?



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Key Takeaway



All communication is intercultural communication, which requires an open attitude to understanding and accommodating cultural differences in the workplace to make business connections.

Examples



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<https://louis.pressbooks.pub/businessprofessionalcomm/?p=681#h5p-59>

Exercises

1. For deeper meaning, return to the definition of culture and reread the five items about culture at the beginning of this chapter. Next, think about these in terms of classroom expectations and then workplace expectations. Are there any differences or similarities? How did you learn these conventions?
2. Go back to your cultural profile. Is there anything you learned about yourself that you previously did not know? Is there anything that you do not understand about the results? Share via discussion with your colleagues about what you found and see if you have any obvious similarities with anyone that you may not have known before.
3. Write the name of 10 different countries around the world—the first 10 that pop up in your head. Next, think about the first characteristics of each country that you think of. (There is no wrong answer.) Once you're finished, read out each country's characteristics and then consider what these countries would say about your own country.
4. Think of two different times you have been part of two different communities concurrently, such as different classes in the same term. What were some of the differences in how you communicated in the respective environments? What affected those differences? Subject? Instructor? Peers? Classroom dynamics?

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CHAPTER 15: ETHICS

Sydney Epps

Chapter Learning Objectives

1. Define professional behavior according to employer, customer, coworker, and other stakeholder expectations.
2. Explain the importance of ethics as part of the persuasion process.
3. Define and provide examples of sexual harassment in the workplace, as well as strategies for how to eliminate it.
4. Identify and provide examples of eight common fallacies in persuasive speaking.
5. Plan and deliver short, organized spoken messages and oral reports tailored to specific audiences and purposes.

From the moment we started considering what communication skills employers desire onward throughout this guide, we've been examining aspects of professional behavior. A recurring theme has been the importance of being nice. The logic is that if you're nice and the people you work with and for like you because they feel that they can trust you and are productive when you collaborate with them, you'll keep your job and be presented with attractive new opportunities. In this section, we'll look closer at behaviors that will get you liked and open doors for you.

Professionalism, Etiquette, and Ethical Behavior Topics

- [15.1: Professional Behavior in the Workplace](#)
- [15.2: Business Etiquette](#)
- [15.3: Respectful Workplaces in the #MeToo Era](#)
- [15.4: Speaking Ethically and Avoiding Fallacies](#)

15.1: Professional Behavior in the Workplace

We've said from the beginning that professional communication must always cater to the audience. This is true, especially in face-to-face interactions where, unlike with written communication, you can assess audience reaction in real-time and adjust your message accordingly. This places the responsibility of behaving professionally in the workplace solely on you. When we speak of professional behavior, we mean the following aspects that generally fall under the banner of soft skills:

- Civility
- Social intelligence
- Emotional intelligence
- Social graces

We'll consider these aspects in more detail throughout this subsection, but first, we'll spend some time on the personality traits of successful professionals.

We must be careful with how we define success when we speak of personality, however. Those who lack the soft skills associated with the above aspects are difficult to work with and are usually demoted or fired. In rare instances, cruel, selfish, arrogant, narcissistic, or sociopathic people rise to positions of power through a combination of enablers tolerating or even rewarding their anti-social behavior and their own lying, cheating, and bullying. This is an unfortunate reality that's difficult to watch, but it's important that the rest of us avoid being enablers. It's also important that we don't let their bad example lead us into thinking that such behavior is right. It isn't, and the proof is the suffering it spreads among people in their sphere of influence. For every horrible person who moves up the corporate ladder, there'll be a trail of broken, bitter, and vengeful people in their wake. The loathing most people feel toward such people proves the importance of conducting ourselves otherwise.

- [15.1.1: The Five Qualities of a Successful Professional](#)
- [15.1.2: Civility](#)
- [15.1.3: Social Intelligence](#)
- [15.1.4: Emotional Intelligence](#)
- [15.1.5: Social Graces](#)

15.1.1: The Five Qualities of a Successful Professional

A persistent idea within the field of psychology is that there are five basic personality traits, often known as the "Big Five" or by the acronyms OCEAN or CANOE. Each trait contains within it a sliding scale that describes how we behave in certain situations. The five are as follows:

- **Openness** to experience: curious and innovative vs. cautious and consistent
- **Conscientiousness**: goal-driven and detail-oriented vs. casual and careless
- **Extraversion**: outgoing and enthusiastic vs. solitary and guarded
- **Agreeableness**: cooperative and flexible vs. defiant and stubborn
- **Neuroticism**: anxious and volatile vs. confident and stable

Except for neuroticism, most of the traits as named correlate with professional success. Researchers have found that successful people are generally organized, innovative, outgoing, cooperative, and stable, although extraverts don't do as well as introverts on individual tasks, and agreeableness doesn't necessarily lead to a high salary ([Spurk & Abele, 2010](#); [Neal et al., 2011](#)).

Blending these with Guffey, Loewy, and Almonte's six dimensions of professional behavior in *Essentials of Business Communication* (2016) and putting our own spin on these ideas, Table 15.1.1 below presents a guide for how generally to be successful in your job, how to be well liked, and how to be happy. Consider it also a checklist for how to be a decent human being.

Table 15.1.1: The Five Qualities of a Successful Professional

Quality	Specific Behaviors
Conscientious	<ul style="list-style-type: none"> • Consistently do your best work in the time you have to do it • Be organized and efficient in your workflow and time management • Be realistic about what you can accomplish and follow through on commitments • Go the extra mile for anyone expecting quality work from you (while respecting time, budget, or other constraints) • Finish your work on time rather than leave loose ends for others
Courteous	<ul style="list-style-type: none"> • Speak and write clearly at a language level your audience understands • Be punctual: arrive at the workplace on time and deliver work by the deadline • Notify those expecting you when you're running late • Apologize for your own errors and misunderstandings • Practice active listening • Share your expertise with others and be a positive, encouraging mentor to those entering the workplace
Tactful	<ul style="list-style-type: none"> • Exercise self-control with regard to conversational topics and jokes • Avoid contentious public and office politics, especially in writing • Control your biases by being vigilant in your diction (e.g., word choices involving gendered pronouns) • Accept constructive criticism gracefully • Provide helpful, improvement-focused feedback mixed with praise • Keep negative opinions of people to yourself • Be patient, understanding, and helpful toward struggling colleagues
Ethical	<ul style="list-style-type: none"> • Avoid even small white lies and truth-stretching logical fallacies • Avoid conflicts of interest or even the perception of them • Pay for products and services as soon as possible if not right away • Respect the confidentiality of private information and decisions • Focus on what you and your company do well rather than criticize competitors to customers and others • Follow proper grievance procedures rather than take vengeance • Be charitable whenever possible
Presentable	<ul style="list-style-type: none"> • Be positive and friendly, especially in introductions, as well as generous with your smile • Present yourself according to expectations in grooming and attire • Practice proper hygiene (showering, dental care, deodorant, etc.) • Follow general rules of dining etiquette

Source: Guffey, Loewy, & Almonte (2016, p. 309: Figure 10.1)

15.1.2: Civility

Civility simply means behaving respectfully toward everyone you interact with. Being civilized means following the golden rule: treat others as you expect to be treated yourself. The opposite of civility is being rude and aggressive, which creates conflict and negatively affects productivity in the workplace because it creates a so-called chilly climate or a toxic work environment. Such a workplace makes people uncomfortable, miserable, or angry—not emotions normally conducive to people doing their best work.

15.1.3: Social Intelligence

In the decades you've been immersed in the various cultures you've passed through, you've come to understand the (often unspoken) rules of decent social interaction. Having social intelligence means following those rules to cooperate and get along with others, especially in conversation. This includes reading nonverbal cues so that you know:

- How and when to initiate conversation
- When it's your turn to speak and when to listen in order to keep a conversation going
- What to say and what *not* to say
- How to say what you mean in a manner that will be understood by your audience
- When and how to use humor effectively and when not to
- How and when to end conversation gracefully

People who lack social intelligence, perhaps because they missed opportunities to develop conversational skills in their formative school years, come off as awkward in face-to-face conversation. They typically fail to interpret correctly nonverbal cues that say “Now it's your turn to speak” or “Okay, I'm done with this conversation; let's wrap it up.” It's difficult to interact with such people because either they make you do all the work keeping the conversation going or they don't let you speak and keep going long after you wanted it to stop, forcing you to be slightly rude in ending it abruptly. Like any other type of intelligence, however, social intelligence can be developed through an understanding of the principles of good conversation and practice.

15.1.4: Emotional Intelligence

Like social intelligence, emotional intelligence (EI) involves being a good reader of people in social contexts, being able to distinguish different emotions, and knowing what to do about them with regard to others and yourself. Strong EI means knowing how a person is likely to react to what you're about to say and adjusting your message accordingly and then adjusting again according to how they actually react. Though we often hide our inner emotional state—smiling and looking happy when we're feeling down or wearing a neutral

“poker face” to mask our excitement—in professional situations, EI enables us to get a sense of what others are actually feeling despite how they appear. It involves reading subtle nonverbal signals such as eye movements, facial expressions and fleeting micro-expressions ([Ekman, 2017](#)), posture, hands, and body movements for how they betray inner feelings different from the outward show. Beyond merely reading people, however, EI also requires knowing how to act, such as empathizing when someone is upset—even if they’re trying to hide it and show strength—because you recognize that you would be upset yourself if you were in their position.

Every interaction you have is colored by emotion—both yours and the person or people you interact with. Though most routine interactions in the workplace are on the neutral-to-positive end of the emotional spectrum, some dip into the red—anywhere from slightly upset and a little sad to downright furious or suicidal. Whether you keep those emotions below the surface or let them erupt like a volcano depends on your self-control and the situation. Expressing such emotions in the workplace requires good judgment, represented by the **3 Ts**:

- **Tact:** Recognizing that what you say has a meaningful impact, tact involves the careful choice of words to achieve intended effects. In a sensitive situation where your audience is likely to be upset, for instance, tact requires that you use calming and positive words to reduce your message’s harmful impact (see Chapter 8 on negative messages). When *you’re* upset, tact likewise involves self-restraint so that you don’t unleash the full fury of what you’re feeling if it would be inappropriate. When emotions are running high, it’s important to recognize that they are just thoughts that come and go. You may need some additional time to process information when you’re in a different emotional state before communicating about it.
- **Timing:** There’s a time and place for expressing your emotions. Expressing your anger when you’re at the height of your fury might be a bad move if it moves you to say things you’ll later regret. Waiting to cool down so that you can tactfully express your disappointment will get the best results if it’s an important matter. If it’s a trivial matter, however, waiting to realize that it’s not worth the effort can save you the trouble of dealing with the fallout of a strong and regrettable reaction.
- **Trust:** You must trust that the person you share your feelings with will respect your privacy and keep whatever you say confidential or at least not use it against you.

By considering these 3 Ts, you can better manage the expression of your own emotions and those of the people you work with and for in the workplace ([Business Communication for Success, 2015, 14.6](#)).

Like those who lack social intelligence, those who lack emotional intelligence can often be difficult to work with and offensive, often without meaning to be. When someone fails to understand the emotional “vibe” of their audience (fails to “read the room”), we say that they are “tone deaf.” This can be a sign of immaturity because it takes years to develop EI through extensive socialization in your school years and beyond, including learning how and why people take offense to what you say. Someone who jokes openly about another’s appearance in front of them and an audience, for instance, either fails to understand the hurt feelings of the

person who is the butt of the joke or doesn't care. Either way, people like this are a liability in the workplace because their offense establishes an environment dominated by insecurity—where employees are afraid that they'll be picked on as if this were the elementary school playground. They won't do their best work in such a “chilly climate” or toxic environment.

15.1.5: Social Graces

Social graces include all the subtle behavioral niceties that make you likable. They include manners such as being polite, etiquette (e.g., dining etiquette), and your style of dress and accessories. We will explore most of these in the following section. For now, we can list some of the behaviors associated with social graces:

- Pronouncing someone's name correctly
- Saying *please* when asking someone to do something
- Saying *thank you* when given something you accept
- Saying *no, thank you, but thanks for the offer* when offered something you refuse
- Complimenting someone for something they've done well
- Speaking positively about others and refraining from negative comments
- Smiling often
- Being a good listener

Of course, there is much more to social graces, but let's focus now on specific situations in which social graces are expressed.

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15.2: Business Etiquette

- [15.2.1: Dining Etiquette](#)
- [15.2.2: Dressing Appropriately for the Workplace](#)

Etiquette is a code of behavior that extends to many aspects of how we present ourselves in social situations. We've examined this throughout this guide in specific written applications (e.g., using a well-mannered, courteous style of writing, such as saying please when asking someone to do something). Though we'll examine specific applications of etiquette associated with various channels (e.g., telephone) throughout this chapter, we will here focus on dining etiquette and dress.

15.2.1: Dining Etiquette

If you are invited out for a lunch by a manager, it's probably not just a lunch. They will assess how refined you are in your manners so that they know whether they can put you in front of clients doing the same and not embarrass the company. Though it may not be obvious, they'll observe whether you use your utensils correctly, chew with your mouth closed, wait till your mouth is empty before speaking or cover your mouth with your hand if you must speak while chewing, and how you position your cutlery when you're done. Why does any of this matter?

Though all of this seems like it has nothing to do with the quality of work, it shows the extent to which you have developed fastidious habits and self-awareness. Someone who chews with their mouth open, for instance, either lacks the self-awareness to know that people tend to be disgusted by the sight of food being chewed or doesn't care what people think. Either way, that lack of self-awareness can lead to behaviors that will ruin their reputation, as well as that of the company they represent. The University of Kansas presents a handy [Dining Etiquette](#) (Kent State University, n.d.) for starters.

15.2.2: Dressing Appropriately for the Workplace

When we hear the word *uniform*, we often think of a very specific style, such as what a police officer or nurse wears. In a general sense, however, we all wear uniforms of various styles in whatever professional or institutional environment we participate in. Dressing appropriately in those situations and in the workplace specifically has everything to do with meeting expectations. In an office environment, clients, coworkers, and managers expect to see employees in either suits or a business-casual style of dress depending on the workplace. In such situations, conformity is the order of the day, and breaking the dress code can be a serious infraction.

[Guidelines on Dress Code \(The Washington Center, 2021\)](#)

Though some infractions are becoming less serious in many places because the general culture is becoming more accepting of tattoos, piercings, and dyed hair as more and more people use these to express themselves, you might need to be careful. Consider the following points:

- **Tattoos:** Though a significant proportion of the population has tattoos and therefore they are more acceptable across the board, overly conspicuous tattoos are still considered taboo. Tattoos on the face, neck, or hands, for instance, are considered risky because of their association with prison and gang branding. Tattoos that can be covered by a long-sleeved shirt with a collar and slacks are a safe bet. However, if you have tattoos on your forearms depicting scenes of explicit sex or violence, consider either getting them removed or never rolling up your sleeves if you want to get hired and keep your job.
- **Piercings:** Of course, earrings are de rigueur for women and acceptable for men as well. However, earlobe stretching and piercings on the nasal septum or lips are still generally frowned upon in professional settings. Any serious body modification along these lines is acceptable in certain

subcultures, but not in most workplaces.

- **Dyed hair:** As with tattoos and piercings, hair dye is becoming more acceptable generally, but extreme expression is inadvisable in any traditional workplace. Where customer expectations are rigid (e.g., in a medical office), seeing someone with bright pink hair will give the impression of an amateur operation rather than a legitimate health care facility.



Army Staff Sgt. Michael Romero shows his tattoos (U.S. Army photo by Sgt. Adrian Borunda/Released, 2015, [Public Domain Mark 1.0](#))

Because conformity is the determining factor of acceptability in proper attire in any particular workplace, the best guide for how to dress when you aren't given a specific uniform is what everyone else wears. Observe closely their style and build a wardrobe along those lines. If the fashion is slacks with a belt that matches the color of your shoes and a long-sleeve, button-up, collared shirt for men and a full-length skirt and blouse for women, do the same ([Feloni, Lee, & Cain, 2018](#)). Nevertheless, professionals in a number of fields have spoken up about the way in which professionalism can follow colonialist norms that marginalize people of non-European descent; for instance, a front tooth gap (considered a symbol of beauty or good luck in some cultures), tightly-coiled hair (or “afros,” braids, and locs), hijabs (hair coverings often worn by women who practice Islam), or a bindi (a body adornment which uses a red dot between the eyebrows on the forehead worn by Hindu and Jain women) may illicit illegal discrimination within workplaces and are ways global diversity may not align with traditional norms (Frye et al., 2020). It is the duty of workplaces to acknowledge their appreciation for these distinct geographical, communal, and religious differences by educating staff on cultural competency, the skills associated with inclusion and personalized interaction (Vescio, Gervais, Heiphetz, & Bloodhart, 2014).

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15.3: Respectful Workplaces in the #MeToo Era

- [15.3.1: The Prevalence of Sexual Harassment in the Workplace](#)
- [15.3.2: What is Sexual Harassment?](#)
- [15.3.3: LGBT Harassment](#)
- [15.3.4: How to Make the Workplace More Respectful](#)

Most of this chapter and guide focuses on how we *should* behave to be effective, respected professionals in our respective workplaces. Unfortunately, this isn't what we always see in actual workplaces. Misbehavior is

rampant and is especially harmful when it's harassment of a sexual nature. The broader culture took a hopeful step forward toward more respectful workplaces in 2017–2018 with the rise of the [#MeToo](#) and [Time's Up](#) movements.



Tarana Burke, Creator of “me too,” presenting at TEDWomen Conference 2018, Palm Springs, California. (Credit: Marla Aufmuth / TED. [CC BY-NC-ND 2.0](#))

The founder of the #MeToo movement—Tarana Burke—brought forth the understanding of a need for conversation surrounding sexual assault against women and children as a survivor of childhood [sexual violence](#). Though initially a response to high-profile sexual assault cases in the entertainment industry where perpetrators often went unpunished for decades, #MeToo activists successfully brought the movement to the broader culture via social media. Encouraged by a series of public accusations, firings, and resignations of prominent men in the entertainment, media, and political arenas throughout North America, women everywhere were encouraged to challenge the widespread toleration of common sexual harassment and

assault by reporting incidents to their employers and speaking out to shame everyday offenders in social media. For those who were unaware, it revealed the troubling extent of sexual harassment in workplaces.

15.3.1: The Prevalence of Sexual Harassment in the Workplace

According to the [Pew Research Center](#) (Graf, 2018), “half of Americans think that men getting away with this type of behavior is a major problem” (para. 7). Forty percent of women (and 16% of men) say they’ve experienced sexual harassment at work; this number has remained stagnant since the [1980s](#). In a separate online survey of 2000 Canadians nationwide, 34% of women reported experiencing sexual harassment in the workplace and 12% of men, and nearly 40% of those say it involved someone who had a direct influence over their career success ([Navigator, 2018, p. 5](#)). These perceptions are completely out of step with what top executives believe, with 95% of 153 surveyed Canadian CEOs and CFOs confirming that sexual harassment is not a problem in their workplaces ([Gandalf Group, 2017, p. 9](#)). Clearly there are differences of opinion between those who experience sexual harassment on the floor and those in the executive suites who are responsible for the safety of their employees, and much of the confusion may have to do with how sexual harassment is defined.

About six-in-ten women say they have been sexually harassed

% saying they have ever personally received unwanted sexual advances or verbal or physical harassment of a sexual nature

	Among women	Among men
All adults	59%	27
White	63	25
Black	50	22
Hispanic	50	34
HS or less	46	24
Some college	65	30
Bachelor's+	70	27
Rep/Lean Rep	56	26
Dem/Lean Dem	63	27

Note: Whites and blacks include only non-Hispanics. Hispanics are of any race. “Some college” includes those with an associate degree and those who attended college but did not obtain a degree.

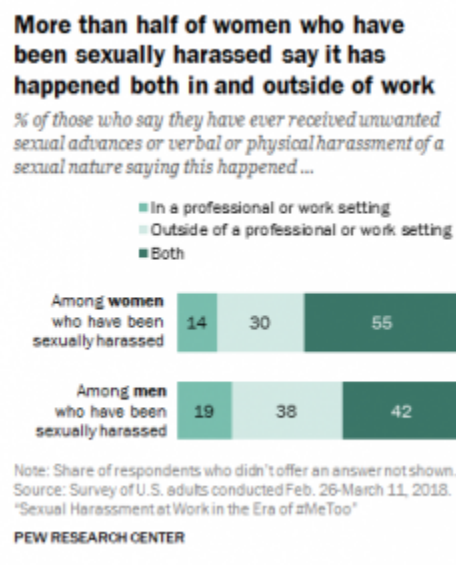
Source: Survey of U.S. adults conducted Feb. 26–March 11, 2018. “Sexual Harassment at Work in the Era of #MeToo”

PEW RESEARCH CENTER

15.3.2: What Is Sexual Harassment?

The [US Equal Employment Opportunity Commission](#)'s definition of sexual harassment is quite broad but oriented more toward the perception of the person offended than the intentions of the offender. Though there is nothing wrong with discrete flirtation between two consenting adults on break at work, a line is crossed as soon as one of them—or third-party observers—feels uncomfortable with actions or talk of a sexual nature. Sexual harassment is a form of sex discrimination that violates [Title VII of the Civil Rights Act of 1964](#).

It is unlawful to harass a person (an applicant or employee) because of that person's sex. Harassment can include "sexual harassment" or unwelcome sexual advances, requests for sexual favors, and other verbal or physical harassment of a sexual nature.



Harassment does not have to be of a sexual nature, however, and can include offensive remarks about a person's sex or gender. For example, it is illegal to harass a woman by making offensive comments about women in general.

Both the victim and the harasser can be either a woman or a man, and the victim and harasser can be the same sex and/or gender.

Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when submission to or rejection of this conduct explicitly or implicitly affects an individual's employment; unreasonably interferes with an individual's work performance; or creates an intimidating, hostile, or offensive work environment.

Sexual harassment can occur in a variety of circumstances, including but not limited to the following:

- The victim as well as the harasser may be a woman or a man. The victim does not have to be of the opposite sex.

- The harasser can be the victim’s supervisor, an agent of the employer, a supervisor in another area, a coworker, or a non-employee.
- The victim does not have to be the person harassed but could be anyone affected by the offensive conduct.
- Unlawful sexual harassment may occur without economic injury to or discharge of the victim.
- The harasser’s conduct must be unwelcome (“Facts about Sexual Harassment,” 2002).

15.3.3: LGBT Harassment

Test Your Understanding



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://louis.pressbooks.pub/businessprofessionalcomm/?p=704#h5p-47>

Though data on harassment experienced by transgender and lesbian, gay, or bisexual (LGB) employees is emerging, the few studies done conclude that harassment toward this demographic includes “sexually-based behaviors (such as unwanted sexual touching or demands for sexual favors) as well as gender- [or orientation-] based harassment” (Feldblum & Lipnic, 2016).

The Williams Institute (2011) notes that 35% of LGBT-identified workers experienced direct harassment in their profession; within the Human Rights Campaign’s *Degrees of Equality Report: A National Study Examining Workplace Climate for LGBT Employees* (2009), 58% of LGBT respondents said they heard derogatory comments or verbiage regarding LGBT people in the workplace. The Williams Institute (2011) also found that transgender individuals generally experience higher rates of harassment than cisgender LGB people.

In a large-scale survey by the National Center for Transgender Equality and National Gay and Lesbian Task Force (2011), half of those surveyed reported workplace harassment; 41% received intrusive inquiries in regard to their gender identity (including their bodies and medical information), and 45% have been referred to by pronouns that did not align with their identity “repeatedly and on purpose” while on the job (Feldblum &

Lipnic, 2016). Sixty-three percent (63%) experienced an extreme act of discrimination, those that impact a person's quality of life and ability to sustain themselves financially or emotionally:

- Lost job due to bias
- Eviction due to bias
- School bullying/harassment so severe the respondent had to drop out
- Teacher bullying
- Physical assault due to bias
- Sexual assault due to bias
- Homelessness because of gender identity/expression
- Lost relationship with partner or children due to gender identity/expression
- Denial of medical service due to bias
- Incarceration due to gender identity/expression

In *Bostock v. Clayton County*, Georgia, No. 17-1618 (S. Ct. June 15, 2020), the Supreme Court held that firing individuals because of their sexual orientation or transgender status violates Title VII's prohibition on discrimination because of sex. The Court reached its holding by focusing on the plain text of [Title VII](#). The law forbids sexual orientation and gender identity discrimination when it comes to any aspect of employment, including hiring, firing, pay, job assignments, promotions, layoff, training, fringe benefits, and any other term or condition of employment ("Sexual Orientation and Gender Identity (SOGI) Discrimination").

15.3.4: How to Make the Workplace More Respectful

Though the [US Equal Employment Opportunity Commission](#) places the responsibility of ensuring a harassment-free workplace squarely on the employer, all employees must do their part to uphold one another's right to work free of harassment. Of course, experiencing harassment places the victim in a difficult position with regard to their job security, as does witnessing it and the duty to report it. The situation is even more complicated if the perpetrator has the power to promote, demote, or terminate the victim's or witness's employment. If you find yourself in such a situation, seeking the confidential advice of an ombudsperson or person in a similar counseling role should be your first recourse. Absent these internal protections, consider seeking legal counsel.

If you witness sexual or other types of harassment, what should you do? The following guide may help:

1. If you can play any additional role in stopping the harassment before it continues, try to get the attention of the person being harassed and ask them if they want support and what you can do to assist. If it's welcome from the victim and safe for both you and them, try to place yourself between them and the attacker. If the victim is handling the attack in their own way, respect their choice.

2. If it's safe for you to do so, try recording video of the incident on your smartphone. The mere presence of the phone may act as a deterrent to further harassment. If not, however, a record of the incident will be valuable in the post-incident pursuit of justice.
3. If the harassment continues, try to de-escalate the situation non-violently by explaining to the offender that the one being harassed has a right to work in peace. Only resort to violence if it's defensive.
4. After a safe resolution, follow up with the person being harassed about what you can do for them ([American Friends Service Committee, 2016](#)). Reporting the attack to appropriate authorities, assuring any evidence gained is transmitted to the victim, and serving as a witness to the attack are all helpful ways to use your presence.

Of course, every harassment situation is different and requires quick-thinking action that maintains the safety of all involved. The important thing, however, is to act as an ally to the person being harassed. The biggest takeaway from the development of the #MeToo and Time's Up movements is that a workplace culture that permits sexual harassment will only end if we all do our part to ensure that offenses no longer go unreported and unpunished.

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15.4: Speaking Ethically and Avoiding Fallacies

- [15.4.1: Eleven Unethical Persuasive Techniques](#)
- [15.4.2: Avoiding Fallacies](#)

When we discussed persuasive messages earlier, we focused on best practices without veering much into what's considered offside in the art of persuasion. When we consider ethical behavior in the workplace, it's worth revisiting the topic of persuasion so that we can address how not to persuade. In other words, how can we avoid manipulating someone in professional situations so that they don't later feel like they were taken advantage of?

In the context of communication, manipulation is the management of facts, ideas, or points of view to play upon people's insecurities or to use emotional appeals to one's own advantage. Though emotional appeals were part of the rhetorical triangle discussed earlier, they cross the line into manipulation when motivated by an attempt to do something against the best interests of the audience, which expects that you treat them with respect. Deliberately manipulating them by inciting fear or guilt is unethical. Likewise, deception is unethical because it uses lies, partial truths, or the omission of relevant information to deceive. No one likes to be lied to or led to believe something that isn't true. Deception can involve intentional bias or the selection of information to support your position while negatively framing any information that might challenge your audience's belief.

Other unethical behaviors with respect to an audience such as a workplace team include coercion and bribery. **Coercion** is the use of power to make someone do something they would not choose to do freely.

It usually involves threats of punishment, which get results at least while the “stick” is present but results in hatred toward the coercing person or group and hence a toxic work environment. **Bribery**, which is offering something in return for an expected favor, is similarly unethical because it sidesteps normal, fair protocol for personal gain at the audience’s expense. When the rest of the team finds out that they lost out on opportunities because someone received favors for favors, an atmosphere of mistrust and animosity—hallmarks of a toxic work environment—hangs over the workplace.

15.4.1: Eleven Unethical Persuasive Techniques

Though you may be tempted to do anything to achieve the result of convincing someone to act in a way that benefits you and your company or organization, certain techniques are inherently unethical. The danger in using them is that they will be seen for what they are—dishonest manipulation—and you’ll lose all credibility rather than achieve your goal. Just as we have a set of DOs for how to convince someone effectively in a decent way, we also have a set of DON’Ts for what not to do.

In *Ethics in Human Communication*, Richard Johannesen (1996) offers eleven points to consider when speaking persuasively. **Do not:**

- Use false, fabricated, misrepresented, distorted, or irrelevant evidence to support arguments or claims
- Intentionally use unsupported, misleading, or illogical reasoning
- Represent yourself as an “expert” (or even informed) on a subject when you’re not, as in the case of “**mansplaining**” ([McClintock, 2016](#))
- Use irrelevant appeals to divert attention from the issue at hand
- Ask your audience to link your idea or proposal to emotion-driven values, motives, or goals to which it is unrelated
- Deceive your audience by concealing your real purpose, your self-interest, the group you represent, or your position as an advocate of a viewpoint
- Distort, hide, or misrepresent the number, scope, intensity, or undesirable features of consequences or effects
- Use “emotional appeals” that lack a supporting basis of evidence or reasoning
- Oversimplify complex, multi-layered, nuanced situations into simplistic, two-valued, either/or, polar views or choices
- Pretend certainty where tentativeness and degrees of probability would be more accurate
- Advocate for something that you yourself do not believe in

If you tried any of the above tricks and were found out by a critical-thinking audience, you risk irreparable damage to your reputation personally and that of your company.

Though you might think that the above guidelines wipe out most of a marketer’s available techniques, in

fact, they leave plenty of room for creative argument following the model for persuasive argument outlined above. After all, the goal of any such argument in a professional situation is to achieve a mutually beneficial result, one where both you and your audience benefit by getting something you both want or need in a free and honest exchange. Your audience will appreciate your fair dealing as you build your credibility.

15.4.2: Avoiding Fallacies

Logicians (experts on logic) have long pointed out a set of rhetorical tricks, called fallacies, that charlatans use to convince others of an argument that has no merit on its own. Though these fallacies are typically deceptive in nature, they still manage to convince many people in ways that undermine their own interests. Whenever you see anyone resorting to these tricks, you should probably be suspicious of what they're selling or getting you to support. To be ethical in the way you present arguments in professional situations and steer clear of being held under suspicion by a critical audience yourself, avoid the eight fallacies explored below in Table 15.4.2.



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Table 15.4.2: Logical Fallacies to Avoid

Fallacy	Definition	Example
1. Red Herring	Any diversion intended to distract attention from the main issue, particularly by relating the issue to a common fear	So-called “safe” injection sites in our neighborhood will mean that more dealers will set up shop, too, leading to more crime.
2. Straw Man	A weak argument set up to be easily refuted, distracting attention from stronger arguments	Safe injection sites will increase illegal drug use because it’ll make those drugs easier to access, defeating the purpose of “harm reduction.”
3. Begging the Question	Claiming the truth of the very matter in question, as if it were already an obvious conclusion	Safe injection sites won’t save anybody because addicts will continue to overdose with or without them.
4. Circular Argument	A proposition is used to prove itself, assuming the very thing it aims to prove (related to begging the question)	Once a junkie, always a junkie. No “harm reduction” approach will solve the opioid crisis.
5. Bandwagon (a.k.a. Ad Populum)	Appeals to a common belief of some people, often prejudicial, and states everyone holds this belief	No one wants a safe injection site in their neighborhood because they don’t care that much about the welfare of drug-addicted criminals.
6. Ad Hominem	Stating that someone’s argument is wrong solely because of something about them rather than about the argument itself	The safe injection site advocate is a junkie himself. How can we trust him on issues of safety when every junkie lies as a matter of habit?
7. Non Sequitur	The conclusion does not follow from the premises	Since this whole obsession with being politically correct began 30 years ago, people now think that even addicts are worthy of respect.
8. Post Hoc Ergo Propter Hoc	Establish a cause-and-effect relationship where only a correlation exists	The rise of liberal attitudes since the 1960s has led to higher rates of incarceration across the country.

(Business Communication for Success, 2015, 14.6)



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Avoiding such false logic helps strengthen your own argument by compelling you to stay within the bounds of sound argumentative strategies such as those covered above in §8.4.

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Key Takeaway



The quality of any workplace culture depends on the ethical conduct of its leadership and employees, with everyone treating one another with respect and speaking responsibly.

Exercises



1. First, think of someone who exemplifies everything you aspire to be in terms of their good behavior in the workplace (loosely defined as anywhere someone does work—not necessarily where it's compensated with money). List the qualities and actions that make them such a good, well-liked model for behavior. Second, think of someone who exemplifies everything you aspire to avoid in terms of their misconduct in the workplace. List the qualities and typical misbehavior that make them so detestable.
2. Deliver a short presentation on dining etiquette or how to dress for success in the workplace with clear recommendations for how your audience should conduct themselves.
3. Have you ever experienced or witnessed sexual harassment in a workplace or institution (e.g., at school)? What happened and what did you do about it? Would you do anything differently in hindsight?
4. Find an example of advertising that is unethical because it relies on logical fallacies and other deceptive techniques. Identify the fallacies or techniques and speculate on why the advertiser used them. Outline a more honest—yet still effective—advertisement for the same product or service.

Test Your Understanding



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