Business Communications for Fashion

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Adapted from Communication @ Work: A College-to-Career Guide to Success (2019) by Tom Bartsiokas and Robin Potter, which was adapted from Business Communication for Success (2015) by Jordan Smith

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Contents

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Introduction

Welcome to your new Business Communications textbook! When you take a communications course in college, it's all about preparing you for the real, everyday tasks of writing and speaking in your chosen profession rather than reading literature and writing essays. Ask any professional in your field, and they'll set you straight on the enormous importance of practical communication in the work they do. In fact, they'll assure you that you won't get far without workplace communication skills enabling you to apply the technical skills you're learning in your other courses. Trust those professionals—they know what they're talking about. You may not fully appreciate it yet, but you really need this guide to help develop those vital communication skills now and in the years ahead as you grow professionally.

This guide is free to you thanks to the people of Ontario via eCampusOntario, an initiative of the Government of Ontario's Ministry of Training, Colleges and Universities. Does this mean it's worse than the expensive communications textbooks available? Not at all. Research shows that, compared with no-cost open textbooks, traditional commercial textbooks offer no inherent advantages that lead to greater academic success (Rockinson-Szapkiw, Courduff, Carter, & Bennett, 2013). Indeed, if an open textbook is robust and comprehensive enough, serves students' learning needs better, and doesn't set them back $130, then it can be better for students in every way.

A Note on Style

Whereas most commercial textbooks on communications maintain a high level of formality, this open textbook relaxes that a little to include contractions, colourful expressions, liberal use of "they" (rather than "he or she") as a singular pronoun, and other characteristics of semi-formal or casual business writing. The idea is to model the style of a common email between work colleagues, which imitates a conversational business style of writing while still being grammatically correct. Notice in the previous sentence and section, for instance, that "email" and "internet" appear instead of the more formal, old-fashioned "e-mail" and "Internet" often used in other textbooks.

Organization

This textbook is divided into nine parts and each of the corresponding units will explore a full range of topics associated with professional communications and the workplace.

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PART I PROFESSIONAL COMMUNICATIONS

Why study communications?

- Required for greater success in other courses in the program.
- Absolutely necessary to your survival in the social and work world.
- Every job involves communicating with a variety of people.

Here are some examples of internship and entry level roles in our fashion industry that list communication skills as a qualification in their job postings (source: indeed.ca):
Merchandise Assistant- Saks Off 5th

- Effectively communicates with external sources

Intern; Marketing- Puma

- Good communication and people skills

Assistant Buyer- YM Inc.

- Excellent written and oral communication skills

Intern; Social Media- Canada Goose

- Effective communication skills, both written and oral

In this first part, we will cover:

- Communication Skills Desired By Employers
- A Diverse Skillset Featuring Communications Is Key To Survival
- Communication Represents You and Your Employer

Unit 1: Communication Skills Desired By Employers

Learning Objectives

1. Understand the importance of developing effective communication skills.
2. Learn the difference between technical skills and soft skills.

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

In its Employability Skills 2000+, the Conference Board of Canada lists "the skills you need to enter, stay in, and progress" in the 21st century workplace. The first category listed is communication skills, specifically how to:

- Read and understand information presented in a variety of forms (e.g., words, graphs, charts, diagrams)
- Write and speak so others pay attention and understand
- Listen and ask questions to understand and appreciate the points of view of others
- Share information using a range of information and communications technologies (e.g., voice, e-mail, computers)
- Use relevant scientific, technological, and mathematical knowledge and skills to explain or clarify ideas (Conference Board, n.d.a)

Likewise, the non-profit National Association of Colleges and Employers in the US 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 in how you organize information and whether you can compose proper, grammatically correct sentences and paragraphs. If you pass that test, 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 co-workers and clients.

The latest thinking in human resources (HR), however, is that both of those traditional filters are unreliable. Applicants can fake them. Expensive as it might be, you could get someone else to write your résumé and cover letter for you, or you can just 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 amidst 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" when the next office "reorganization" comes down.

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, don't 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 are the best predictors 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 Government of Canada's Job Bank site and find your chosen profession (i.e., Retail and Wholesale Buyers -6222) via the Explore Careers by Essential Skills page. List the particular document types you will be responsible for communicating within a professional capacity by reading closely through the Reading, Document Use, and Writing drop-downs.

2. Read all the units in Part I: Professional Communications to get a sense of why this course is so vital to your career sense then list your communication strengths and weaknesses. Think about what you hope to get out of this Communications course.

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Unit #2: A Diverse Skillset Featuring Communications Is Key to Survival

Learning Objective

1. 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 skillset 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. Rather, if the current job-hopping trend continues, "Canadians can expect to hold roughly 15 jobs in their careers" (Harris, 2014) and the future for many will 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 can't 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 the Brookfield Institute for Innovation + Entrepreneurship at Ryerson University in Toronto are that 42% of Canadian jobs—especially low-paying ones—are at high risk of being affected by automation by the mid-2020s to 2030s. Some of those will be eliminated outright, but most will be redefined by requiring new skillsets 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).

Since the future of work is a series of careers and juggling several gigs at once, 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 aren't 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, won't 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.

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Unit #3: Communication Represents You and Your Employer

Learning Objective

1. 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 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. But 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 isn't 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-calibre work that you're paying for. By the same token, we can assume that the one who didn't 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 don't 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.

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PART II THE WRITING PROCESS 1 — PREPARING

Like communication in general, good writing comes from following a process. Between an author hatching an idea and the audience reading and understanding that idea, the writing process enables the author to craft messages in a time-efficient manner that ultimately meets the needs of the audience. Without following a four-stage process – (1) preparing, (2) information gathering, (3) drafting and (4) editing) – an author can waste plenty of their own time writing what doesn't need to be written and wasting the reader's time by confusing them with a message that doesn't meet their needs. The next four chapters deal with each of these four writing stages, dividing them into several steps that, when followed as a matter of habit, can save you time by helping you write no more or less than you need to in achieving your professional communication goals.

In this part, we will cover:

- Knowing Your Purpose for Writing
- Analyzing Your Audience
- Selecting Appropriate Channels

Unit 4: Knowing Your Purpose for Writing

Learning Objective

1. Distinguish between general and specific purposes for writing.

Rarely does anyone write for professional reasons just for fun. Whether you're dashing off a quick email, filling out a work order, or a composing a large market research report, there's a good reason for doing it—related, even if in a roundabout way, to getting paid for contributing to the profitability of an organization. Knowing your reason for writing is essential to staying on track in a writing process that, if followed from beginning to end, will save you time and effort by helping you write no more or less than you have to. The next four chapters will break down this writing process into four stages—preparing, researching, composing, and editing—each with a few sub-stages. But the whole process starts with knowing your purpose, which will guide you towards writing an effective message in a document appropriate for the audience and occasion.

Getting back to the communication process examined in the previous chapter, we can say that all communication, including writing documents, involves both a general and a specific purpose regarding the feedback message. The **general purpose** is the end-goal of communication such as aiming to inform, persuade, motivate, entertain, or a combination of these and other effects. The hope is that a sender's message will come back as a feedback message proving that the receiver correctly understood the information, was persuaded to support an idea, was motivated to follow a desired action, was amused, etc. With the end goal in mind, the effective writer reverse-engineers the message to achieve the desired effect.

The most common general purpose of workplace messages is to inform. Most emails, memos, and reports cover a topic thoroughly and precisely with the journalistic 5 Ws + H subtopics

- Who
- What
- Where
- When
- Why
- How

How much weight you give each subtopic (or any weight at all) depends on the situation. Sometimes the *why* isn't important and other times a rationale is crucial to an information message that also requires persuasion. Take, for instance, an email by a construction contractor responding to a customer inquiry about whether they can do a bathroom renovation. A thorough response would include details such as *what* exactly would need to be done and how (a labour itemization as part of the price estimate), *how* many workers would be assigned to the job (the *who*), and how long it would take (the *when*). Details such as the *where* and *why* are already given (e.g., the bathroom is being renovated because it is 25 years out of style and the baseboards are mouldy) although the contractor may provide an estimate that includes explanations detailing why the price might fluctuate given unknown factors such as delayed materials shipments and midway design changes by the client.

The **specific purpose** always depends on the situation at hand. If the general purpose of the above estimate is to inform, the specific purpose is to provide a written record of the probable price so that the customer can compare estimates from other companies and decide which offers the best value. Specific purposes may involve ulterior motives—hence secondary or tertiary purposes besides the primary general purpose. The contractor may, for instance, use the opportunity to provide a brochure illustrating attractive-looking past reno jobs to give the customer a sense of the quality of work the contractor does and inspire them with options ahead of their design consultation. Such marketing falls under secondary general purposes related to credibility and persuasion

Of course, any communicator must ensure that their purpose is realistic, which again affects the credibility of the message. If, for instance, the contractor priced themselves out of a job by providing a $40,000 bathroom reno estimate to a lower- or middle-income customer, the goal of winning the contract would fail for the contractor having misjudged the customer's price range. All customers and employers seek the greatest value—preferably higher quality at lower cost. If professionals fail to strike a realistic balance by offering low quality at unreasonably high cost or "over-promise and under-deliver" with a too-good-to-be-true offer of extremely high quality at very low cost (unless this is a "loss-leader" marketing strategy for more regularly priced work to follow), they will be seen as lacking credibility either way.

Key Takeaway

Knowing your general and specific purposes for writing at the outset of the writing process helps keep you on track with topic selection.

Unit 5: Analyzing your Audience

Learning Objectives

1. Analyze primary and secondary audiences using common profiling techniques.
2. Adjust writing style according to audience.

Just as the first commandment in any business is “Know thy customer,” so the first in communication is “Know thy audience.” And just as any business thrives or dies by how well it supplies a customer demand, any act of communication’s success depends entirely on how well the sender tailored it to meet the needs and expectations of the audience. Sometimes that audience is a person or group you know; sometimes it’s a person or group you don’t, but you always adjust your message content and style to what you know or can guess at about them. You wouldn’t speak to a customer approaching you for the first time the same way you would a co-worker buddy, 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:

- **How big** is 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 CC’d or people you can’t because they could be forwarded your email without you knowing)?
- What is my professional or personal **relationship** to 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?**

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

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 them by name in the opening salutation and continue to use the second person singular *you* throughout. When addressing two or three, say for a project that involves 2-3 partners (including you, making 3-4 altogether), you would likewise address them each by name, either in alphabetical order or in order of who is primarily involved and then descending in size of contribution. Past four, however, you may start to use collective salutations such as "Hello, team," or "Hi, all." Luckily, the second-person plural pronoun *you* is the same as the singular. For small audience such as this, your style can generally follow the conversational rapport you've developed with them, whether that be formal or informal, humourless 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, say in a blog on your company's website, your language must be as plain and accessible as possible. In Canada, the public includes readers who will appreciate that you use simple words rather than big, fancy equivalents because English may be their second or third language. Indeed, the Government of Canada has published a handy guide for how to write accessibly in plain language:

Use Familiar language, known expressions, and illustrations

Tips:

- 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

Examples:

Instead of:	Use:
23-01-2003	January 23, 2003
We can reasonably speculate that young adults want to hear about terrorism and security issues.	Young adults are likely to want to hear about terrorism and security.
Tax payers are encouraged to e-file their tax returns.	Did you know that you can file your tax returns on the internet?

Source: Communication Canada (2003, *p.* 16)

Likewise, your writing to large audiences must be unbiased in terms of gender, ethnicity, age, ability, or orientation lest you offend members of those groups. Because using masculine singular pronouns like *he*, *his*, and *him* would exclude the female half of your audience, for instance, you would use the gender-neutral plural pronouns *they*, *their*, and *them* instead. (Using those plural pronouns for singular situations is also becoming acceptable although you might want to avoid doing that if writing to someone you know is a grammar stickler unless you discover that they are fine with the practice.) When identifying people by their role, use non-gender-exclusive equivalents. See Queen's University's (2014) Inclusive Language Guidelines page for more on avoiding bias in your writing.

The larger the group, the more careful you must be with using unique English idioms as well. Idioms are quirky or funny expressions we use to make a point. If you wanted to reassure a customer who recently immigrated from North Africa, for instance, before explaining an automotive maintenance procedure unique to Canadian winter weather and said, "Hey, don't worry, it'll be a piece of cake," they may be wondering what eating cake has to do with switching to winter tires. Likewise, if you said instead that it'll be "a walk in the park," they would be confused about why they need to walk through a park to get their radials switched. Calling it a "cakewalk" wouldn't help much, either. These expressions would be perfectly understood by anyone who has been conversing in English for years because they would have heard it many times before and used it themselves. In the case of using them around EAL (English as an additional language) speakers, however, you would be better off using the one word that these idioms translate as: *easy*. Again, the whole goal of communication is to be understood, so if you use idioms with people who haven't yet learned them, you will fail to reach that goal. See www.theidioms.com for a wide selection of English idioms and their meanings.

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Considering Secondary Audiences

Always consider secondary or even tertiary audiences for any message you send because, besides secondary audiences you may invite, you have little-to-no control over what tertiary audiences see your message unless confidentiality can be somehow guaranteed. Your emails can be forwarded, your text or voicemail messages shown or played, and even what you say can simply be reported to tertiary audiences and be believed (depending on the credibility of the reporter). Youth who are more comfortable writing electronically than speaking in person often make the mistake of assuming privacy when sending messages and get in trouble 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 that voicemail in professional situations, however, always consider how it would be received by your manager, your family, or a jury.

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). If 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, then uses that email account to sell trade secrets before leaving for another job, the employer has a right to read those 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. 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 in 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 CC (complementary copy) your manager or other interested stakeholders in any email, for instance, you will be more careful than you otherwise would be to ensure that your message is completely free of any language or content that would make you or them look bad. 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 yourself designate CC recipients, as explained above, someone else could. Say you're 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, CC's 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, 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 CC'd to be kept in the loop. In such cases, clarify with them to what extent they want to see the progress; CC'ing 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.

Reference

Lublin, D. (2012, November 8). *Do employers have a right to spy on workers?* The Globe and Mail. Retrieved from https://beta.theglobeandmail.com/report-on-business/careers/career-advice/experts/do-employers-have-a-right-to-spy-on-workers/article5104037/?ref=http://www.theglobeandmail.com&

Considering Your Relationship to the Audience and Their Position

Just as you might wear your best clothes for an important occasion like a job interview or wedding, you must respectfully elevate the formality of your language depending 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 are judgmental and will pigeonhole you as sloppy and careless about details if you send them a poorly written email; whereas, all employers want to see that their employees are detail-oriented for the money they're paying them, especially if the employees' writing is representing the company to clients and other stakeholders (Wiens, 2012). Ultimately, you don't want to embarrass yourself and lose out on professional opportunities with glaring writing mistakes that more thorough proofreading could have caught.

Formality in writing requires correct grammar and punctuation, whereas more casual writing takes liberties such as using sentence fragments and contractions. If writing to a friendly co-worker a quick information-sharing email, for instance, you might say, "Just a quick heads-up: don't forget to submit your travel expenses to Brenda in HR by 4:30 today." The first clause is a noun-phrase fragment rather than an independent clause with a subject ("I …") and predicate ("… am sending you …"), it contains colloquialisms such as "heads-up" (meaning "forewarning" or "reminder"), the contraction "don't" shortens "do not," and the initials "HR" are shorthand for "the Human Resources department." Of course, your audience knows how to interpret all of this and will appreciate the conciseness of the message because it shaves seconds off the reading process, respecting their time. If you were the administrative assistant to an important manager, however, you may want to be more formal, courteous, correct, and yet still concise by saying "Please submit your travel expenses to Brenda in HR by 4:30pm today." Formality conveys respect.

Formality in writing also involves carefully selecting words that are slightly fancier than the colloquial ("informal") words you would normally use in everyday situations. Word choice is called "diction" and, if it 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 for the context in which you're using it. When writing 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 slightly fancier words along the formality spectrum, yet not so fancy as to come off as pretentious. Such obfuscation wouldn't be reader-friendly and wouldn't 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 want instead to strike a balance with a semi-formal style somewhere between overly formal and too casual. Your writing should read much like you talk in conversation, although it must be grammatically correct.

Table 5.1: 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

Considering Your Audience's Level of Knowledge

A key preparatory step whenever sharing information is to gauge approximately how much your audience knows about the topic you're writing about so that you provide no more and no less information than is necessary. This benefits both them and you. 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 over explain a topic in an email, you make the double mistake of wasting the reader's time and insulting them by presuming their ignorance. Besides getting on their bad side, this becomes a triple mistake considering the time *you* wasted in writing more than you had to.

On the other end of that spectrum, writing too little because you've incorrectly assumed that your audience knows what you know also inconveniences them. 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 gauging your audience's level of knowledge extends to the language you use. Every profession has its jargon, which is the specialized vocabulary, shorthand code words, and slang 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 special words or expressions being used. 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. A legal professional, for instance, is necessary to help navigate someone through an unfamiliar court process and the bewildering legal terminology in documents related to it. But that professional must be able to translate that difficult legal language into familiar terms that the uninitiated can easily understand.

Besides using plain language, effective document design can also help aid 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. For instance, if you're explaining how to find the date of a webpage if one is not indicated on the page itself:

1. Go to google.com or place your cursor in the search bar of a Chrome browser tab.
2. Write "inurl:" in the search bar and paste the URL of the webpage you want the date for from "www." onward.
3. Paste "&as_qdr=y15" at the end of the Google search URL.
4. Hit your Enter key and the date that the webpage was last updated will appear in grey on the third line of the first result.

is so much easier for your reader to follow than:

First, go to google.com or place your cursor in the search bar of a Chrome browser tab, write "inurl:" in the search bar, and paste the URL of the webpage you want the date for from "www." onward. Next, paste "&as_qdr=y15" at the end of the Google search URL, then hit your Enter key. The date will appear in grey on the third line of the first result.

Brief, bolded headings and subheadings for discreet topics within a document also help 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 like in a novel, finding this section using the Table of Contents and index alone would be difficult. Again, it's on you to make the writing clear and easy to find.

Considering Your Audience's Demographic

The previous subsection explained the necessity of gauging your audience's level of education in a given subject area, and that extends to their more general level of education as well as other demographic factors such as age. Depending on your profession, you may have to deal with people of all ages and levels of education from elementary school children to world-wise retirees. Dental hygienists, for instance, adjusts their language from being simple with an overly enthusiastic, over-the-top friendly and reassuring tone with a child client in the dentist chair one moment, then switches in the next to using more technical vocabulary in a matter-of-fact yet still-friendly tone with an older client who has had years of dentist-chair lectures enough to know what "excessive plaque buildup at the gumline" means.

Sometimes judging levels of understanding can be difficult and lead to trouble when done in error, so tact and emotional intelligence is essential. Speaking to an elderly person as you would a child because you assume they've fallen into feeble-minded senility when they are indeed still capable can be downright insulting to them. Don't be surprised if your condescension is met with 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 gauging the level of one's understanding if it could be either expert or clueless 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 nonverbals (if communicating in person).

If your correspondent's writing style similarly betrays a lack of 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 getting the hang of it,
- extremely intelligent at some things but just not at writing,
- very young and still learning how to write,
- very old and either out of practice or losing their faculties,
- functionally illiterate, as is the case with 2 out of 5 Canadian adults (Conference Board of Canada, 2013),
- affected by any number of learning disabilities of varying severity, or
- good writers and smart, but in a terrible rush.

Unless you know otherwise, you can guess at any of the above explanations (or a combination of them) before responding, but never respond assuming one of them to be the case. Rather, respond without judgment to someone who writes poorly, but do so in a plain, accessible style using familiar words and fully explain 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 behaviour or even violence, nothing is wrong with holding those beliefs as far as you're concerned. The success of Canada's multicultural society depends on the tolerance and understanding between citizens. In your writing, always be understanding towards others' beliefs; don't belittle or insult them. If someone writes you to say that they will be absent because of a Muslim holiday you did not know about, for instance, use this as an opportunity to learn something about that holiday so you can say, for instance, "Eid Mubarak" at the end of your message to maintain goodwill.

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.

Reference

The Conference Board of Canada. (2013). *Adult literacy rate—low-level skills*. How Canada Performs. Retrieved from http://www.conferenceboard.ca/hcp/details/education/adult-literacy-rate-low-skills.aspx

Unit 6: Selecting Appropriate Channels

Learning Objective

1. Distinguish between communication channels to determine which is most appropriate for particular situations.

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 behaviour in the workplace, for instance, the right thing to do is discuss it in person with all involved because conflict resolution requires social intelligence informed by all the verbal and nonverbal information you can offer to and 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 toxic 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.) Recognizing that email is only one channel on a spectrum of other options, however, and that others would be more efficient in certain situations, can save plenty of hassle from automatic reliance on one favoured or comfortable channel.

Between traditional and rapid electronic media, we have more choice for communication channels than ever in human history. Each has its own unique advantages and disadvantages that make it appropriate or inappropriate for specific situations. Knowing those pros and cons, summarized in Table 6.1 below for a dozen of the most common verbal and written channels available, is necessary for being an effective communicator in the modern workplace. Choosing channels wisely can mean the difference between a message that is received and understood as intended (the goal of communication), and one that is lost in the noise or misunderstood in costly ways.

Table 6.1: The Spectrum of Common Workplace Communication Channels

Channel: In-person conversation and group meeting

Advantages	Disadvantages	Expectations	Appropriate Use
• The most information-rich channel combining words and nonverbal messages • Dialogue facilitates immediate back-and-forth exchange of ideas • Maintains the human element • Additional participants can join for group discussion	• Requires that speakers be physically in the same space together • Some people are poor listeners and some are poor speakers • Impermanent unless recording equipment is used	• Audience must be present and attentive • Use for genuine dialogue • A dynamic speaking ability is required to engage audiences	• Quickly exchange ideas • Visually communicate to complement your words • Add the human element in discussing sensitive or confidential topics

Channel: Email

Advantages	Disadvantages	Expectations	Appropriate Use
• Delivers messages instantly anywhere in the world to anyone with an internet connection • Sends to one or many people at once, including secondary audiences • Allows attachments of up to several megabytes and links to internet webpages • Allows for a back-and-forth thread on the topic • Archives written correspondence for review even decades later • Can be done on any mobile device with an internet connection • Is free (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	• Gives the illusion of privacy: your messages can be forwarded to anyone, monitored by your company or an outside security agency, retrieved with a warrant, or hacked even if both you and receiver delete them • 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 • Subject to errors such as hitting "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	• Reply within 24 hours, or sooner • Follow conventions for writing • Polite tone and mindful use • One topic per message • Proofread to correct grammar, punctuation, and spelling • Avoid confusion due to vagueness	• Transmit messages efficiently and cost effectively • Document work • Use when confidentiality isn't necessary • Send electronic documents as attachments • Send the same message to multiple receivers

Channel: Instant/Text message

Advantages	Disadvantages	Expectations	Appropriate Use
• Enables the rapid exchange of concise written messages • Can be done quietly so as to not be overheard • Inexpensive • Autocomplete feature helps achieve efficiencies in typing speed and spelling • Nonverbal characters such as emojis can clarify tone • Enables team members to stay current on breaking developments	• Often used to avoid human contact • Acronyms and sms abbreviations may not be understood by all recipients • Encourages informality with lazy abbreviations, initialisms, and acronyms • Even 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 nonverbals such as emojis 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	• Respond immediately or as soon as possible • Be patient if the recipient doesn't respond immediately; they may be busy with real-life tasks • Proofread when used for professional purposes • Use only when able; never text when driving	• Use for exchanging short messages quickly with someone physically distant • Get an information exchange (links, photos, videos and documents) in writing for reference later • Use when confidentiality isn't important

Channel: Tweet

Advantages	Disadvantages	Expectations	Appropriate Use
• Able to reach a large audience of social media users for promotion using hashtags and by developing a following • Able to broadcast real-time updates accessible on smartphones • Able to send and reply to direct messages rapidly • The 280-character limit (140 before 2018) on tweets encourages conciseness • Able to link people to webpages for more information	• The 280-character limit forces concision often leading to confusing initialisms, abbreviations, and word omission	• Strike a balance in posting frequency—not too seldom, not too often • Be concise but also clear and grammatically correct • Maximize potential by using hashtags and links to usher readers towards further information • Focus on company, product, service when tweeting for work purposes	• Broadcast information in real time to a broad range of users • Use when confidentiality isn't important

Channel: Instagram

Advantages	Disadvantages	Expectations	Appropriate Use
• Instagram for Business provides branding visuals for interested customers, especially millennials and GenZs • Allows customers to respond in real time	• 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 • 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 • Contributes to a platform seen to be the worst for mental health (Royal Society for Public Health, 2017)	• Use for providing visuals of company products or services • 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	• Post company photos to reach younger demographics

Channel: Article, essay, or blog

Advantages	Disadvantages	Expectations	Appropriate Use
• Able to write at length about any topic and reach a potentially large online audience as a blog or article published in an online media outlet • Can allow dialogue if a comments section is enabled	• Tend to be monologues without the possibility of feedback • People with short attention spans tend to avoid large chunks of text • Some tend to be wary of blogs because they are a genre overpopulated by people's ill-formed opinions	• Organize with a clear topic thesis and support it with a logical flow of convincing arguments built around credible evidence • Edit and proofread to ensure correctness, conciseness, and reader-friendly flow • Enable comments for feedback and dialogue	• Articulate thoughts on topics that require lengthy development

Channel: Letter

Advantages	Disadvantages	Expectations	Appropriate Use
• Shows respect through formality and effort • Ensures confidentiality when sealed in an envelope and delivered to the recipient's physical address (it is illegal to open someone else's mail) • Can introduce other physical documents (enclosures) • Can be sent as an attachment	• Slow to arrive at the recipient's address depending on how far away they are from the sender • Can be intercepted or tampered with in transit (albeit illegally) • Can be overlooked as junk mail • Time consuming to print, sign, seal, and send for delivery • Mail postage is costlier than email	• Follow formatting conventions (e.g., block for company letters, modified block for personal letters) • Use company letterhead template when writing on behalf of your organization	• For providing a formal, permanent, confidential written message to a single important person or organization • Ideal for bad-news messages and matters with possible legal implications (e.g., claims), and responses to letters • For non-urgent matters

Channel: Memo

Advantages	Disadvantages	Expectations	Appropriate Use
• Provides a written record of group decisions, announcements, policies, and procedures within an organization • Can also be a format for delivering short/informal 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 emailed	• Requires a good archiving system to make memos easily accessible for those (especially new employees) needing to review a record of company policies, procedures, etc.	• Use template with company letterhead • Follow the same conventions as email, except omit the opening and closing salutations and e-signature	• For a written record for decisions, announcements, policies, procedures, and short reports shared within an organization • Post a printed version on an office bulletin board and email to all involved

Channel: Report / PowerPoint/ Slide Report

Advantages	**Disadvantages**	**Expectations**	**Appropriate Use**
• Allows presentation of a high volume of information presenting research and analysis • Can take various forms such as document booklet or proposal for reading alone or PowerPoint for presenting	• 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	• Follow conventions for organizing information according to the size of the report, audience, and purpose • Augment with visuals • Engage audiences with effective oral delivery and visual appeal	• 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)

Channel: Fax

Advantages	**Disadvantages**	**Expectations**	**Appropriate Use**
• Fast delivery of letters and forms • Allows the use of company letterhead	• Limited to 8.5×11" formats • Expensive for the purchase of fax machines and paper rolls that need regular replacing • Possibly expensive if long-distance phone charges apply • Few people use fax and a dwindling number of businesses still use them	• Keep it short • Use only if required in an industry that still favours fax	• For sending forms or work orders in industries that still use fax (e.g., health care)

Channel: Phone, VoIP, voicemail, and conference calls

Advantages	Disadvantages	Expectations	Appropriate Use
• 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	• 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 • Time zone differences complicate the timing of long-distance calls • Possibly expensive for long-distance calls over a public switched telephone network (PSTN) if VoIP isn't available • Not always clear how long you have to leave a voicemail message, running the risk of being cut off if your message runs too long • Recording of conversations is typically unavailable unless you have special equipment	• Follow conventions for initiating and ending audio-only conversation • For voicemail, strike a balance between brevity and detail • Record a professional call-back message for voicemail • Respond to voicemail as soon as possible • Be careful with confidential information over the phone and on voicemail	• For when quick dialogue is necessary between speakers physically distant from one another • Conference call when members of a team can't be physically present for a meeting • Use VoIP to avoid long-distance charges • Leave clear voicemail messages when receivers aren't available • When a record of the conversation isn't necessary • When confidentiality is somewhat important

Channel: Video chat and web conference

Advantages	Disadvantages	Expectations	Appropriate Use
• Enables face-to-face one-on-one or group meetings for people physically distant from one another • Allows participants to see nonverbals that would be unseen in a phone conference meeting • Can be integrated into a real in-person meeting to include those physically absent • Inexpensive with common applications such as Skype, FaceTime (for Apple devices), and Google Talk • Cheaper than flying people to meetings	• Connection problems often result in poor audio quality (cutting in and out) and participants talking over one another • Enterprise applications improve functionality but for a cost	• Requires a high-speed internet connection, microphone, and webcam • 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	• For 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

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

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

All of these decisions may occur to you in the span of a second or so because they are largely habitual. Figure 6.1 charts out that decision-making process for selecting the most appropriate channel among the 12 given in Table 6.1 above.

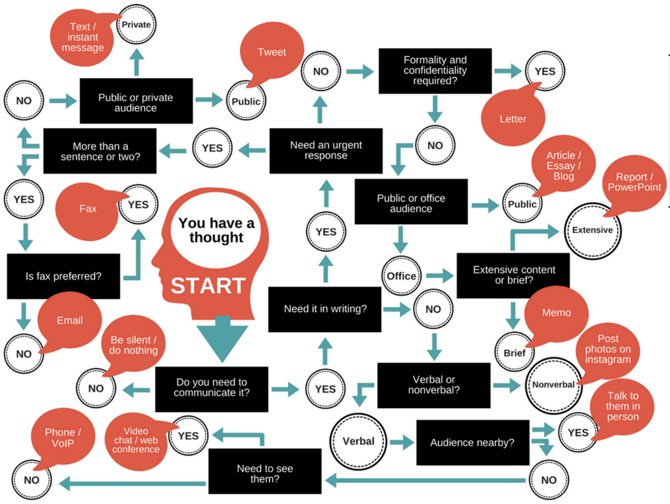

Figure 6.1: Channel Selection Process Flow Chart

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

We will examine the uses, misuses, conventions, and implications of these channels in the chapters ahead. For now, however, let's appreciate that choosing the right channel at the outset of the writing process saves time—the time that you would otherwise spend correcting communication errors and doing damage control for having chosen the wrong one for the situation at hand. If you find yourself forced to meet someone in person to deal with the damage wrought by a toxic email exchange before moving forward, just think how you would be into the next steps if you had skipped the email war and met in person to deal with the situation like adults in the first place.

Key Takeaway

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

Exercises

Identify the most appropriate communication channel for each situation and explain your reasoning.

1. You come up with a new procedure that makes a routine task in your role in a retail store quicker and easier; the District Manager now wants you to share it with the other employees in your role in the entire district.
2. You are working with two other students on a research 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.
3. You are about to close a big sale 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.
4. You were under contract for services to develop social media content for a company. Near the end of the job, you discovered that the company was dissolved, but you haven't yet been paid for services rendered. You want to formally inform the company of the charges and remind them of their contractual obligations; in doing so you want to lay down a paper trail in case you need to take the company to court for breach of contract.

Reference

Royal Society for Public Health. (2017, May 19). *Instagram ranked worst for young people's mental health.* Retrieved from https://www.rsph.org.uk/about-us/news/instagram-ranked-worst-for-young-people-s-mental-health.html

PART III THE WRITING PROCESS 2 — RESEARCHING

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

In this part, we will cover:

- Choosing a Research Methodology
- Locating Credible Sources
- Using Source Text: Quoting, Paraphrasing, and Summarizing
- Documenting Sources in APA

Unit 7: Choosing a Research Methodology

Learning Objective

1. Distinguish between the primary and secondary research methodology.

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

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 not working. You're no expert on printers, but you know who to ask. You go to Erika, the admin. assistant in your previous department, and she says to definitely go with the Ricoh printer. You trust what she says, so you end your research there and pass along this recommendation to your manager. 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 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 webpages and specification manuals, customer reviews, 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, labour, 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? Well, your gut isn't much help when you're in a difficult situation. If you're going to spend a few thousand dollars on the best printer, you're going to want to do it right. You don't want to waste money on one that has several problems that you could have known about beforehand had you done your homework. In this case, formal research ("homework") protects you against preventable losses.

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 a controlled group. 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 observations 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 labour-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, we will break down the labour-intensive process of building a document around source material collected through formal secondary research.

Key Takeaway

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

Exercise

1. Go to your library website at Seneca Libraries and find the "Fashion" subject guide. Become familiar with 3 key databases that are recommended there that would be useful for assignments.

Unit 8: Locating Credible Sources

Learning Objective

1. Locate, select and organize relevant, current and accurate information from a variety of credible sources.

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 horribly out of date and only of historical interest. Whether in the library or on the open internet, the only real way to ensure that a source is worth using is to develop critical thinking skills in knowing what to look for in sorting the wheat from the chaff.

Assessing the Credibility of Library 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 they don't have the same years of focused study, training, and clinical practice in the field. The PhD is a more advanced credential than a master's degree, which is more advanced than an undergrad (four-year bachelor's) degree, which is more advanced than a college diploma or certificate, which is more advanced than a high school diploma. In the absence of more detailed information, you can roughly gauge how credible an authority someone is on a topic based on where they fall on that spectrum of education.
    - Years of successful industry experience is also a trustworthy credential. If the author of a trade journal or blog article has 35 years of experience in the industry, 20 of those as an owner of a thriving business, you can expect expert knowledge from them if their topic is on matters directly related to their profession.
    - Likewise, a blogger can only be taken seriously if they are a working professional writing about their work and shouldn't be relied on outside of their area of expertise.
    - A blogging hobbyist might have some interesting things to say, but without expert training and credentials, their word doesn't carry much weight. If a backyard astronomer discovers something major in the night sky, for instance, it takes verification and systematic cataloguing from credentialed astronomers employed by renowned institutions before the discovery is considered real.

- **Currency:** Depending on the topic, how recently the source was published can be a key indicator of credibility.
    - A book on communications technology from 1959 is no longer a relevant authority on communications because technology has changed so much since then.
    - In technology fields generally, a source may be considered current if it was published in the past 5-10 years; in some sub-disciplines, especially in computing, currency may be reduced to more like 1-2 years depending on how fast the technology is advancing. Disciplines that advance at a slower pace may have major sources still current even after 15-20 years because nothing has since come along to replace them.

- **Author objectivity:** If the author argues entirely on one side of a debate on which experts disagree, be suspicious of the source's credibility.

- If the author identifies the other sides of a debate and convincingly challenges them with strong evidence and sound reasoning, then their work is worth considering.
- If the author ignores the controversy altogether, summarily dismisses alternative points of view out of hand, offers dubious arguments driven by logical fallacies, simplifies complex issues by washing out any nuance, or appears to be driven more by profit motive than dedication to the truth, then the audience will become suspicious. Using such an extremely slanted source will undermine your own credibility.
- Company websites, especially for smaller businesses, are generally suspect because their main goal is to attract customers and, ultimately, profit, so they're not going to focus too much on information that may give potential customers reason to think twice no matter how legitimate it is. A home security alarm company, for instance, is probably not going to post crime statistics in an area that has record-low criminal activity because people will conclude that home security is a non-issue and therefore not worth spending money on. The company is more likely to sidestep rational appeal and prey instead on fears and anxieties by dramatizing scenarios in which your home and loved-ones are violated by criminals. If the company website focuses on education, however, by explaining what to look for to assess the credibility of the professional you're seeking, then you are probably looking at a successful operation that does quality work and doesn't need to fleece you in order to survive.

- **Publisher quality:** If the source publisher is an established, long-running, big-city (e.g., New York or Toronto) or university press with a large catalogue, you can be reasonably assured that the source underwent an editorial process that helped improve its validity.
  - Run a quick background check on the publisher by looking up their website and some other sources on them such as the *Wikipedia* articles via its List of English-language book publishing companies (2018) and List of university presses (2018). Since this is quick, informal secondary research, you need not document this research unless you were writing a report specifically on their credibility.
  - An editorial process means that more people besides the author reviewed the work for quality assurance prior to publishing.
  - A self-published ("vanity press") book lacking that constructive criticism, however, wouldn't necessarily have had the benefit of other people moderating the author's ideas and pushing them towards expert consensus.
  - If the publisher isn't a university press or operates outside of the expensive New York City zip code, however, that's not necessarily a guarantee that it lacks credibility, but you may want to do a background check to ensure that it's not a publisher with a catalog of, say, 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 with the quality of their thinking. If your writing is organized and well structured, abides by accepted conventions, and is error-free, your thinking tends towards all such qualities too. If someone's writing is a mess and rife with errors, on the other hand, it often betrays a scattered and careless mind.
    - Notice that quality publications will have very few if any writing errors.

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

Assessing the Credibility of Online Sources

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

Although successful in being a comprehensive repository of knowledge, *Wikipedia.org*, for instance, is not generally considered credible and should therefore not appear as a source in a research document unless it's for a topic so new or niche that no other credible sources for it exist. By the organization's own admission, "*Wikipedia* cannot guarantee the validity of the information found [on their site]." The Web 2.0, user-generated nature of *Wikipedia* means that its articles are susceptible to vandalism or content changes inconsistent with expert opinion, and they aren't improved by any formal peer-review process (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.

A final indicator of credibility for online sources, similar to the writing-quality check discussed above, is the overall design quality of the website. The attractiveness of a site may be subjective, but a user-friendly and modern design suggests that money was spent relatively recently on improving its quality. If the site looks like it was designed 10-15 years ago and hasn't been updated, you can suspect that it's lost its currency. Some websites look dated despite their content still being relevant, however, because that content doesn't change drastically over time.

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. Read the sections in your Program Standards Handbook on "Evaluating research sources".

References

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Unit 9: Using Source Text: Quoting, Paraphrasing, and Summarizing

Learning Objective

1. Paraphrase, summarize, and reformat information collected from written materials.

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 an 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 identified mistakes in it, you should at this point be able to draft a thesis. 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 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 following-up with a full citation in your reference list at the end of your document is essential to avoid a charge of plagiarism. Let's now look at each of these in turn

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 (“ ”).

    - 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.
    - 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. 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 to paraphrase properly than to quote and to source that paraphrase.
- **Block-quote sparingly if at all:** In rare circumstances, you may want to quote a few sentences or even a paragraph at length if it’s important to represent every single word. If so, the convention is to tab the passage in on both the left and right, not use quotation marks, set up the quotation with a signal phrase or sentence ending with a colon, and place the in-text citation following the final period of the block quotation. 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 quotations 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, the 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.

- **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 "…").
  - 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 are 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.

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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. 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 EAL learners and native English users whose general writing skills are still developing.

A common mistake that students make when paraphrasing is to go only part way towards paraphrasing by substituting major words (nouns, verbs, and adjectives) here and there while leaving the source passage's basic sentence structure intact. This inevitably leaves strings of words from the original untouched in the "paraphrased" version, which 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 substitutes words selectively (lazily):

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

Let's look at the same attempt, but colour the unchanged words red to see how unsuccessful the paraphraser was in rephrasing the original in their own words (given in black):

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

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

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

1. Read and re-read the source-text passage so that you thoroughly understand each point it makes. If it's a long passage, you might want to break it up into digestible chunks. If you're unsure of the meaning of any of the words, look them up in a dictionary; you can even just type the word into the Google search bar, hit *Enter*, and a definition will appear, along with results of other online dictionary pages that define the same word.
2. Look away and get your mind off the target passage.
3. Without looking back at the source text, repeat its main points as you understood them—not from memorizing the exact words, but as you would explain the same ideas in different words out loud to a friend.
4. Still without looking back at the source text, jot down that spoken wording and tailor the language so that it's stylistically appropriate for your audience; edit and proofread your written version to make it grammatically correct in a way that perhaps your spoken-word version wasn't.
5. Now compare your written paraphrase version to the original to ensure that:

- You've accurately represented the meaning of the original without:
  - Deleting any of the original points
  - Adding any points of your own
  - Distorting any of the ideas so they mean something substantially different from those in the original, or even take on a different character because you use words that, say, put a positive spin on something neutral or negative in the original
- You haven't repeated any two identical words from the original in a row

6. If any two words from the original remain, go further in changing those expressions by using a thesaurus in combination with a dictionary. When you enter a word into a thesaurus, it gives you a list of synonyms, which are different words that mean the same thing as the word you enter into it.

- Be careful, however; many of those words will mean the same thing as the word you enter into the thesaurus in certain contexts but not in others, especially if you enter a homonym, which is a word that has different meanings in different parts of speech.

- For instance, the noun *party* can mean a group that is involved in something serious (e.g., a third-party software company in a data-collection process), but the verb *party* means something you do on a wild Saturday night out with friends; it can also function as an adjective related to the verb (e.g., *party trick*, meaning a trick performed at a party).

- Whenever you see synonymous words listed in a thesaurus and they look like something you want to use but you don't know what they mean exactly, always look them up to ensure that they mean what you hope they mean; if not, move on to the next synonym until you find one that captures the meaning you intend. Doing this can save your reader the confusion and you the embarrassment of obvious thesaurus-driven diction problems (poor word choices).

7. Cite your source. Just because you didn't put quotation marks around the words doesn't mean that you don't have to cite your source.

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 co-workers 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 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 overview of a meeting your colleague was absent from, or an elevator pitch selling a project idea to a manager. It can also be as formal as a memo report to your colleagues on a conference you attended on behalf of your organization.

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);

    - 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 above.
5. Edit your draft to make it coherent, clear, and especially concise.
6. Ensure that your summary meets the needs of your audience and that your source is cited. Again, not having quotation marks around words doesn't mean that you are off the hook for documenting your source(s).

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

Key Takeaway

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

Unit 10: Documenting Sources in APA

Learning Objective

1. Cite research using in text citations and a reference list using the APA style.

To prove formally that we've done research, we use a two-part system for documenting sources. The first part is an in text 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 full citation in the reference list at the end of the document. This second part gives further details about the source so that readers can easily retrieve it themselves. Though documenting research requires a little more effort than not, it looks so much better than including research in a document without showing where you got it, which is called plagiarism. Before focusing further on how to document sources, it's worthwhile considering why we do it and what exactly is wrong with plagiarism.

Academic Integrity *vs.* Plagiarism

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

Plagiarism is theft, and bad habits of stealing others' work in school likely begin as liberal attitudes towards intellectual property in our personal lives, but often develop into more serious crimes of copyright or patent violations in professional situations with equally serious financial penalties or destruction of reputations and earning power. The bad habits perhaps start from routines of downloading movies and music illegally because, well, everybody's 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 website. Here's where things go wrong.
3. They also see that the other company has posted an attractive photo beside their description, so the employee downloads that and puts it on their website also.

The problem is that both the text and photo were copyrighted, as indicated by the "All Rights Reserved" copyright notice at the bottom of the other company's webpage. Once the employee posts the stolen text and photo, the copyright owner (or their legal agents) 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).

Students who think they're too clever to get caught plagiarizing may not realize that plagiarism in anything they submit electronically is easily exposed by sophisticated plagiarism-detection software and other techniques. Most instructors use third party software (like Turnitin and SafeAssign) that 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.

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

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

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

But do you need to cite absolutely *everything* you research? Not necessarily. Good judgment is required to know what information can be left uncited without penalty. If you look up facts that are common knowledge (perhaps just not common to you yet, since you had to look them up), such as that the first Prime Minister of Canada Sir John A. MacDonald represented the riding of Victoria for his second term as PM even without setting foot there, you wouldn't need to cite them because any credible source you consulted would say the same. Such citations end up looking like attempts to pad an assignment with research.

Certainly anything quoted directly from a source (because the wording is important) must be cited, as well as anyone's original ideas, opinions, or theories that you paraphrase or summarize (i.e., indirectly quote) from a book, article, or webpage with an identifiable author, argument, and/or primary research producing new facts. You must also cite any media such as photos, videos, drawings/paintings, graphics, graphs, etc. If you are ever unsure about whether something should be cited, you can always ask your librarian or, better yet, your instructor since they'll ultimately assess your work for academic integrity. Even the mere act of asking assures them that you care about academic integrity. For more on plagiarism, you can also visit plagiarism.org, Seneca Libraries APA Citation Guide, The Learning Portal and the *Purdue* OWL Avoiding Plagiarism series of modules (Elder, Pflugfelder, & Angeli, 2010).

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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 citation, but not in both. Table 10.1 below shows both options (e.g., Examples 1 and 3 versus 2 and 4, etc.).
- When two authors are credited with writing a source, their surnames are separated by "and" in the signal phrase and an ampersand (&) in the parenthetical citation (see Examples 3-4 in Table 10.1 below).
- When 3-5 authors are credited, a comma follows each surname (except the last in the signal phrase) and citation, and the above and/& rule applies between the second-to-last (penultimate) and last surname.
    - When a three-, four-, or five-author source is used again following the first use (i.e., the second, third, fourth time, etc.), "et al." (abbreviating *et alium* in Latin, meaning "and the rest") replaces all but the first author surname.
    - See Examples 5-6 in Table 10.1 below.

- If two or more authors of the same work have the same surname, add first/middle initials in the citation as given in the References at the back.
- If no author name is given, either use the organization or company name (corporate author) or, if that's not an option, the title of the work in quotation marks.
    - If the organization is commonly referred to by an abbreviation (e.g., "CIHR" for the Canadian Institutes of Health Research), spell out the full name in the signal phrase and put the abbreviation in the parenthetical citation the first time you use it, or spell out the full name in the citation and add the abbreviation in brackets before the year of publication that first time, then use the abbreviation for all subsequent uses of the same source. See Examples 9-10 in Table 10.1 below).
    - If no author of any kind is available, the citation—e.g., ("APA Style," 2008)—and the bibliographical entry at the back would move the title "APA style" (ending with a period and not in quotation marks) into the author position with "(2008)" following rather than preceding it.
- If the source you're using quotes another source, try to find that other, original source yourself and

use it instead. If it's important to show both, you can indicate the original source in the signal phrase and the source you accessed it through in the citation, as in:

- ◦ Though kinematics is now as secular as science can possibly be, in its 1687 *Pincipia Mathematica* origins Sir Isaac Newton theorized that gravity was willed by God (as cited in Whaley, 1977, p. 64).

2. **Year** of Publication

- The publication year follows the author surname either in parentheses on its own if in the signal phrase (see the odd-numbered Examples in Table 10.1 below) or follows a comma if both are in the citation instead (even-numbered Examples).
- If the full reference also indicates a month and date following the year of publication (e.g., for news articles, blogs, etc.), the citation still shows just the year.
- If you cite two or more works by the same author published in the same year, follow the year with lowercase letters (e.g., 2018a, 2018b, 2018c) in the order that they appear alphabetically by title (which follows the author and year) in both the in-text citations and full bibliographical entries in the References at the back.

3. **Location** of the direct or indirect quotation 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 webpages, use paragraph numbers (whether the paragraphs are numbered by the source text or not) preceded by the paragraph symbol "¶" (called a pilcrow) or the abbreviation "para." if the pilcrow isn't available (see Examples 1-2 and 5-6 in the table below).

Table 10.1 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 10.1: Example APA-style In-text Citations with Variations in Number of Authors and Source Types

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

For more on APA-style citations, see Seneca Libraries APA Citation Guide, The Learning Portal and Purdue OWL's In-Text Citations: The Basics (Paiz et al., 2017) and its follow-up page on authors.

The References list

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

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 webpages will indicate the exact calendar date and time they were updated, in which case use that because you can assume that the authors checked to make sure all the content was current as of that date and time. Often, the only date given on a website will be the copyright notice at the bottom, which is the current year you're in and common to all webpages on the site, even though the page you're on could have been posted long before; see the technique in the point below, however, for discovering the date that the page was last updated.
  - If no date is given, indicate "(n.d.)," meaning "no date." For electronic sources, however, you can determine the date in the Google Chrome browser by typing "inurl:" and the URL of the page you want to find the date for into the Google search bar, hitting "Enter," adding "&as_qdr=y15" to the end of the URL in the address bar of the results page, and hitting "Enter" again; the date will appear in grey below the title in the search list.
  - If listing multiple sources by the same author, the placement of the years of publication means that bibliographical entries must be listed chronologically from earliest to most recent.
  - If listing two or more sources by the same author in the same year (without month or date information), follow the year of publication with lowercase letters arranged alphabetically by the first letter in the title following the year of publication (e.g., 2018a, 2018b, 2018c).

- **Title(s):** Give the title in "sentence style"—i.e., the first letter is capitalized, but all subsequent words are lowercase except those that would be capitalized anyway (proper nouns like personal names, place names, days of the week, etc.) or those to the right of a colon dividing the main title and subtitle, and end it with a period.
  - If the source is a smaller work (usually contained in a larger one), like an article in a newspaper or scholarly journal, a webpage or video on a website, a chapter in a book, a short report (less than 50 pages), a song on an album, a short film, etc., make it plain style without quotation marks, and end it with a period.
  - If the source is a smaller work that is contained within a larger one, follow it with the title of the longer work capitalized as it is originally with all major words capitalized (i.e., don't make the larger work sentence-style), italicized, and ending with a period.
  - If the source is a longer work like a book, website, magazine, journal, film, album, long report (more than 50 pages), italicize it. If it doesn't follow the title of a shorter work that it contains, make it sentence-style (see the *Elements of Style* example above, which becomes "*Elements of*

style").
    - If the book is a later edition, add the edition number in parentheses and plain style following the title (again, see the *Elements of Style* example above).

- **Editor(s):** If a book identifies an editor or editors, include them between the title and publication information with their first-name initial (and middle initial if given) and last name (in that order), "(Ed.)" for a single editor or "(Eds.)" for multiple editors (separated by an ampersand if there are only two and commas plus an ampersand if there are three or more), followed by a period.
    - If the book is a collection of materials, put the editor(s) in the author 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 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 (Paiz et al., 2017) and the pages following

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

- **Title:** References
  - Center the title at the top of the page at the end of your document (though you may include appendices after it if you have a long report).
  - The title is not "Works Cited" (as in MLA) nor "Bibliography"; a bibliography is a list of sources not tied to another document.
- **Listing order:** Alphabetically (unnumbered) by first author surname
  - If a corporate author (company name or institution) is used instead of a personal name and it starts with "The," alphabetize by the next word in the title (i.e., include "The" in the author position, but disregard it when alphabetizing).
  - If neither a personal nor corporate author is identified, alphabetize by the first letter in the source title moved into the author position.
- **Spacing**: 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 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.

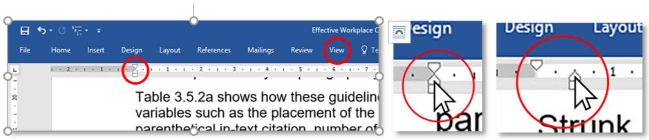

Figure 10.1: Tabbing a References list by making the left-margin tab visible, clicking on the bottom triangle, and dragging it a half-centimeter to the right

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

References

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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 name 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 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 Canadian legislation, using images for educational purposes is considered "Fair Dealing" (i.e., safe) when you won't make any money on it (Copyright Act, 1985, §29), but contacting the owner and asking permission is still the safest course of action. The next safest is to ask your librarian if your use of an image in whatever circumstances might be considered offside or fair.

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

- Centred 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 10.2), you must indicate that status along with the other information outlined above and illustrated below.

Figure 10.2. Algonquin couple of the *Kitcisipiriniwak* ("Ottawa River Men") encountered by the French on an islet on the Ottawa River. From "Algonquines," watercolour by an unknown 18th-century artist, https://upload.wikimedia.org/wikipedia/commons/3/3a/Algonquins.jpg. Public domain (2008) courtesy of the City of Montreal Records Management & Archives, Montreal, Canada.

If your document is a PowerPoint or other type of presentation, 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 that 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:

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 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 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.

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 APA style.

Exercise

1. Become familiar with the APA guide on the Seneca libraries website found at [APA Guide](#) . It will be very helpful for citing your research accurately in your assignments.

References

Copyright Act (R.S.C., 1985, c. C-42, amended June 19, 2017). Retrieved from the Justice Laws Website: http://laws-lois.justice.gc.ca/eng/acts/c-42/

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PART IV THE WRITING PROCESS 3 — DRAFTING

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 part, your document will be partway there, but how much revising you do depends on how effectively you've organized your message.

In this part, we will cover:

- Choosing an Organizational Pattern
- Outlining Your Message
- Writing in the Business Standard Style
- Effective Document Design

Unit 11: Choosing an Organizational Pattern

Learning Objective

1. Recognize and apply standard patterns of message organization.

The shape of your message depends on the purpose you set out to achieve. 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. 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.

Most business 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 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 the main point/idea
    - Background for better understanding
    - Detailed explanations or instructions

- Convincing rationale in a persuasive message

This information is crucial to the audience's understanding of and commitment to the message.

- Our memory typically blurs these details, however, so having them written down for future reference is important. The message body is a collection of important subpoints in support of the main point, as well as transitional elements that keep the message coherent and plot a course towards its completion.

3. Wrap-up and **closing**

- The closing completes the coverage of the topic and may also point to what's next, such as cues to what action should follow the message (e.g., what the reader is supposed to do in response to a letter, such as 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 both at 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.

Direct Messages

Because life is short, most messages do their reader a solid favour by taking the direct approach or frontloading the main point, which means getting right to the point in the first paragraph. 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 and follow with details in the message body. The writer who frontloads their message, finds themselves in their readers' good graces for making their meaning clear upfront, freeing up readers to move quickly through the rest of the document and on to other important tasks in their busy lives.

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 neutral to positive, the direct approach is the only appropriate organizational pattern. Except in rare cases where your message delivers bad news, is on a sensitive topic, or when your goal is to be persuasive, all messages should take the direct approach. Since most business messages have a positive or neutral effect, all writers should frontload their messages as a matter of habit unless they have good reason to do otherwise. The three-part message organization outlined in the 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.

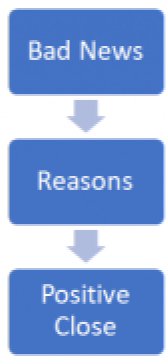
Let's say, for instance, that you send an email to a client with e-transfer payment instructions so that you can be paid for work you did for them. Because you send this same message so often, the objective and context of this procedure is so well understood by you that you may fall into the trap of 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 that this is about paying for the job you did at the end of the email, 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. You'll have to follow up either way, but you have better things to do. If you properly anticipated your audience's reaction and level of knowledge, you would know that opening with a main point (like below) 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. 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. 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 restate that main point so that it is among the first—if not *the* first—sentence the reader sees at the top of the document, despite being among the last written.

Figure 11.1: Direct Pattern: Routine Messages

Figure 11.2: Direct Pattern: Negative News



Indirect Messages

While the direct approach leads with the main point, the indirect approach strategically 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 towards it. In such cases, the direct approach would come off as overly blunt, tactless, and even cruel. The goal of indirect messages is to use the opening and some of the message body to ease the reader towards 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, service, or even an idea.

Organizing Persuasive Messages

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

Nearly every commercial you've ever seen follows this general structure, which is designed to keep you interested while enticing you towards 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.

Organizing Negative Messages

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, goodwill, or any other reason to keep reading
2. **Reasons** for the bad news about to come
3. **Bad news** buried and quickly deflected towards further positives or alternatives
4. **Positive Close**

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 11.1.: Comparison of Direct and Indirect Messages

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

Here we can see at first glance that the indirect message is longer because it takes more care to frame and justify the bad news, starting with an opening that attempts to win over the reader's agreement by appealing to their sense of reason. In the direct approach, the bad news is delivered concisely in blunt words such as "cutting" and "shutting," which get the point across economically but suggest cruel aggression with violent imagery. The indirect approach, however, makes the bad news sound quite good—at least to shareholders—with positive words like "improve," "streamlining," and "strengthening." The good news that frames the bad news makes the action sound more like an angelic act of mercy than an aggressive attack. The combination of careful word choices and the order in which the message unfolds determines how well it is received, understood, and remembered as we shall see when we consider further examples of persuasive and bad-news messages later in the textbook.

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. 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 11.2 below. For instance, you might:

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

- Include a history of the company told 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 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 can provide readers with a recognizable form that will enable them to find the information they need.

Table 11.2: Ten Common Organizing Principles

Organizing Principle	Structure & Use	Example
1. Chronology & 5W+H	• Linear narrative from beginning to end, including past, present, and possibly future, as well as the who, what, where, when, and how of the story • For historical accounts, incident reports, and biographies	Wolfe Landscaping & Snowblowing began when founder Robert Wolfe realized in 1993 that there was a huge demand for reliable summer lawncare and winter snow removal when it seemed that the few other available services were letting their customers down. Wolfe began operations with three snow-blowing vehicles in the Bridlewood community of Kanata and expanded to include the rest of Kanata and Stittsville throughout the 1990s. WLS continued its eastward expansion throughout the 2000s and now covers the entire capital region as far east as Orleans, plus Barrhaven in the south, with 64 snow-blowing vehicles out on the road at any one time. WLS recently added real-time GPS tracking to its app service and plans to continue expanding its service area to the rural west, south, and east of Ottawa throughout the 2020s.
2. Comparison & Contrast	• Point-by-point account of the similarities between two or more things, followed by a similarly structured account of their differences • For descriptive analysis of two or more related things	Wolfe Snowblowing goes above and beyond what its competitors offer. While all snowblowing 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 relate • For an analysis of the causal connection between things	As soon as snow appears in the weather forecast, Wolfe Landscaping & Snowblowing reserves its crew of dedicated snow blowers for 24-hour snow removal. When accumulation reaches 5 cm in your area, our fleet deploys to remove snow from the driveways of all registered customers before the city plows get there. Once the city plow clears your street, a WLS 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 towards a goal • For an analysis of how something works, or instructions for performing a certain task	Ordering our snow removal service is as easy as 1 2 3: 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 got you covered for any snowfall of 5 cm or more between November 1st and April 15th. Once accumulation reaches 5 cm at any time day or night, weekday or weekend, holiday or not, we send out our fleet of snow blowers to cover neighbourhood routes, going house-by-house to service registered customers. At each house, a loader-mount snow blower scrapes your driveway and redistributes the snow evenly across your front yard in less than five minutes.
8. Definition & Example	• Starts with a definition and provides specific examples for illustration • For explaining concepts to people coming to the topic for the first time	A loader-mount 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.
9. Point Pattern	• 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	Wolfe Landscaping & Snowblowing's "Don't Lift a Finger This Winter" deluxe package ensures that you will always find your walkway and driveway clear when you exit your home after a snowfall this winter! It includes: • Clearing and salting your driveway with every 3 cm or more of snow accumulation • Clearing the snowbank at the end of your driveway within minutes of it being formed by the city plow • Shoveling and salting your walkway all the way to your front door after a 3 cm+ snowfall or freezing rain • Shoveling by request any other walkways on your property

10. Testimonial	• First-person account of an experience • For offering a perspective that the reader can relate to as if they were to experience it themselves	According to Linda Sinclair in the Katimavik neighbourhood, "Wolfe did a great job clearing our snow this past winter. We didn't see them much because they were always there and gone in a flash, but the laneway was always scraped clear by the time we left for work in the morning if it snowed in the night. We never had a problem when we got home either, unlike when we used Sherman Snowblowing the year before and we always had to stop, park on the street, and shovel the snow bank made by the city plow whenever it snowed while we were at work. Wolfe was the better service by far."

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

Key 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.

Reference

Baddeley, A. (2000). Short-term and working memory. In E. Tulving & F. I. M. Craik (Eds.) *The Oxford Handbook of Memory* (pp. 77-92). New York: Oxford University Press. Retrieved from https://books.google.ca/books?id=DOYJCAAAQBAJ

Unit 12: Outlining Your Message

Learning Objective

1. Apply outlining techniques to begin drafting a document.

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 (Background, Details and Context)
    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 (or respond to one as soon as you read 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 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 12.1 below.

Table 12.1: Brief Message Outline as a Basis for an Email Draft

Message Outline	Email Message Draft
	Greetings!I am interested in your snow-removal service this winter.
1. Interested 2. Our details a. address b. driveway 3. Questions: a. prepaid cost vs. one-time? b. discounts?	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 12.1 above, as well as add the other conventional email message components.

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 12.1 above, Table 12.2 below shows how the outline for each of the first three principles keeps each piece organized prior to being fleshed out into sentences.

Table 12.2: Outline Possibilities Based on Organizing Principles

Organizing Principle	Outline
1. Chronology & 5W+H	I. Past A. Founding: who, when, what, and why B. Origin and expansion: where, when, and how II. Present A. Coverage: where B. Technology: what III. Future: where and when
2. Comparison & Contrast	I. Main idea: Wolfe is better than the competition II. Background context/details: Comparison-Contrast A. Comparison: what all companies do—clear your driveway B. Contrast: how Wolfe does it better i. Follows the city plow ii. Does your street parking iii. Offers walkway shoveling and salting iv. 10% cheaper for base service III. Conclusion: Wolfe wins, no contest!
3. Pros & Cons	I. FAQ: Why get snow removal? II. Pros & Cons A. Advantages i. professional driveway clearing ii. 24/7 service iii. saves time iv. avoids injury B. Disadvantages i. expense ii. potential property damage III. Concluding recommendation: get the service

As we shall see later in the textbook, outlining is key to organizing other projects such as presentations. 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.

Exercise

1. Once you receive your “Report Assignment”, try organizing your major and minor points in an outline.

Unit 13: Standard Business Style

Learning Objective

1. Edit your writing using elements of business writing style.

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 co-worker 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 respected and maintain good relations. This section reviews those style choices and focuses especially on the six major characteristics of good writing common to both formal and casual writing.

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 in unit 5. There, we saw how certain situations call for formal writing and others for a more relaxed style, and saw that these styles involve word choices along a spectrum of synonyms from "slangy" to casual to fancy. Here we will review those considerations in the context of the writing process.

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 create goodwill with your audience, such as anyone outside your organization, higher than you within your organization, and those on or around your level with whom you have never communicated with before. These audiences include managers, customers, clients, B2B suppliers and vendors, regulators, and other interested stakeholders such as government agencies. A cover letter, for instance, will be read by a potential manager probably unfamiliar to you, so it is a very real test of your ability to write formally—a test that is crucial to your career success. Many common professional document types also require formality such as other letters, memos, reports, proposals, agreements, and contracts. In such cases, you are expected to follow grammatical rules more strictly and make slightly elevated word choices, but not so elevated that you force your reader to look up rarely used words (they will not; they will just make up their mind about you being pretentious and a slight pain to deal with).

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

2. Casual/Conversational Style in Writing

Your ability to gear-down to a more casual/conversational 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 the informal vocabulary exemplified in the semi-formal/common column of Table 5.1 , including conversational expressions such as "a lot" instead of the more formal "plenty." You would also use contractions such as *it's* for *it is* or *it has*, *would've* for *would have*, and *you're* for *you are*. While not a sign of disrespect, the more relaxed approach says to the reader "Hey, we're all friends here, so let's not try so hard to impress each other." When an upper-level manager wants to be liked rather than feared, they'll permit a more conversational style of communication in their employees' interactions with them, assuming that doing so achieves collegiality rather than disrespect.

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

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 smoove top 2 bottom – inside + out – be real lit when were done widdit, cost a buck fiddy for da hole d-lux package, so u down widdit erwat

The inquiring customer would have serious concerns about the quality and educational level of the personnel staffing the company, and thus about the quality of work they'd do. The customer 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 opposite the goal of communication and especially in situations where you want to be understood by a general audience (see Unit 5). 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/conversational 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 colourful 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.

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 favoured in social media communication especially among millennials, emojis are useful for helping clarify the emotional state of the message sender in a way that plain text can't. They offer a visual cue in lieu of in-person nonverbals. A simple "thumbs up" emoji even works well as an "Okay, got it" reply in lieu of any words at all, so they can help save time for the busy professional. Interestingly, 2,500 years after Egyptian hieroglyphics fell out of use, pictographs are making a comeback! Emojis also go partway toward providing something of a universal language that allows people who speak different languages to communicate in a way that wouldn't have been possible otherwise.

However, the lack of precision in emojis can also cause confusion as they may be interpreted differently if the social and cultural context of the receiver differs enough from that of the sender (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.

Be careful with emojis also in any situation involving buying or selling, since commercial messages can end up in court if meanings, intentions, and actions part ways. In one case, emojis were used in a text message signalling intent to rent an apartment by someone who reneged and was judged to be nonetheless on the hook for the $3,000 commitment (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, as mocked in the accompanying Baroness von Sketch Show video short (CBC Comedy, 2017), 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.

A YouTube element has been excluded from this version of the text. You can view it online here: https://pressbooks.senecacollege.ca/fashionbuscomm/?p=71

Source: CBC Comedy (2017)

The 6 Cs of Style

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

- 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, 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, 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 a smaller budget.
- Instead of saying that a home's annual average basement radon level is a cause for concern, be specific in saying that it is 220 Bq/m3 (for becquerels per cubic metre) so that the reader knows how far above Health Canada's guideline level the home 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 25 being moved to 9 a.m. Thursday, May 31, 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 5 or May 4, 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 1; 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 Canada Revenue Agency left a voicemail message at 12:48 p.m. on Thursday, February 8, 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. 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 wordcount a little, the gains in clarity justify the expense.

2. Conciseness

The goal of professional writing is to 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, wordcount-extending sentence constructions, including the passive voice. Of course, their college instructors or professional audiences are frustrated by this kind of writing 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 over complicate a point is uncontrollable at the drafting stage, it's probably better to get everything out while knowing that you'll be 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 over complicated expressions at the drafting stage from having been so aggressive in chopping them out at the editing stage of the writing process. Of course, if you make a habit of writing concisely even at the drafting stage, you'll minimize the amount of editing work you leave yourself at the final 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 unit 11, outlining structures in unit 12, and paragraph organization all help to achieve a sense of coherence. The pronouns and transitions you use especially help to connect the distinct points that make up your bare-bones outline structure as you flesh them out into meaningful sentences and paragraphs.

4. Correctness

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

5. 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 on board 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 counter intuitive, 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 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. But simply changing the pronouns isn't enough. 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 flip side 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 flip side 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, or, for instance, calling it "improvable" and instead 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. Make it a habit to use positive words instead of negative if it's clear that doing so will result in a more positive outcome.

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, 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 in 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 rigour 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/conversational, or informal style characterized by the "Six Cs": clarity, conciseness, coherence, correctness, courtesy, and conviction.

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Unit 14: Effective Document Design

Learning Objective

1. 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.

Almost every business document that exists as a standalone unit must have a title that accurately represents its contents. It's the first thing a reader looks for to understand what the document is all about and should thus be easily found centred at the top of the first page of any small document, and prominently placed on the cover of larger reports. Even emails and memos have titles in the form of subject lines. In whatever document you find it, 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. 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*), nor articles (*the*, *a*, *an*) unless they're the first word of the main title or subtitle (Darling, 2014a, 2014b, 2014c).

    - When including a hyphenated word (i.e., with a compound-modifier hyphen), leave the second word, the one immediately following the hyphen, lowercase (see the first two examples in the titles listed at the end of this subsection).

- **Structure:** Use a noun, verb, or adjective phrase rather than a complete sentence.
    - **Main title:** If your title comes in two parts with a main title and subtitle, the main title establishes the general context of the topic, perhaps with catchy or clever phrasing, and ends with a colon (:) with a single space after it but none before.
    - **Subtitle:** The subtitle follows the main title with a more specific and detailed summary of the document topic.

- **Position:** Centre the title at the top of the page and include 1-2 empty lines below it to separate it from the opening text.
- **Typeface:** Use bold typeface to help draw the eye towards the title, as well as colour if appropriate.

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)
- "Fake News: Facebook and Matters of Fact in the Post-truth Era" (White, 2017)
- "Instagram Ranked Worst for Young People's Mental Health" (RSPH, 2017)
- "Gray Matters: Too Much Screen Time Damages the Brain" (Dunckley, 2014)
- "Higgs Boson Researchers Mocked for Using Comic Sans Font" (CBC, 2012)
- "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.

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 unit 12). The drafting process of fleshing out that outline may suggest tweaks to those heading and subheading titles. As titles, headings must be properly phrased and capitalized like main titles.

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

Font

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

1. Font Type

Writers considering typeface must choose between two major style categories depending on how they would like to accommodate their 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 whither away at the thin part of the stroke and are thus harder to read. In the appropriate format, all the fonts mentioned above make a document look respectable. **Comic Sans**, on the other hand, is appropriate for documents aimed at children, but undermines the credibility of any professional document, such as when the unfortunate choice to use it when reporting CERN particle physics discoveries became more newsworthy than the discoveries themselves (CBC, 2012).

2. Font Size

Size is another important consideration because readers depend on text being an ideal 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 recommended size by the Accessibility for Ontarians with Disabilities Act (AODA) . 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. As we shall see, the ideal font size for bullet points in a PowerPoint is in the 30- to 35-point range, whereas a 12-point font will appear microscopic on a projector screen, if not invisible, from across the room.

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 Colour

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

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

4. Boldface, Italics, and Underlining

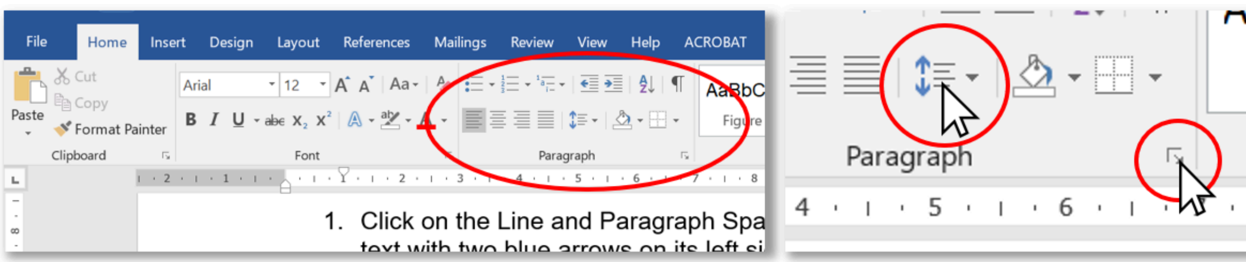
Boldface, *italics*, and <u>underlining</u> serve various purposes in focusing audience attention on certain words. Boldface type is especially helpful in directing audience eyes towards titles, headings, and keywords as you can see at the beginning of this paragraph and throughout this textbook. Highlighting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

Line Spacing

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

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

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



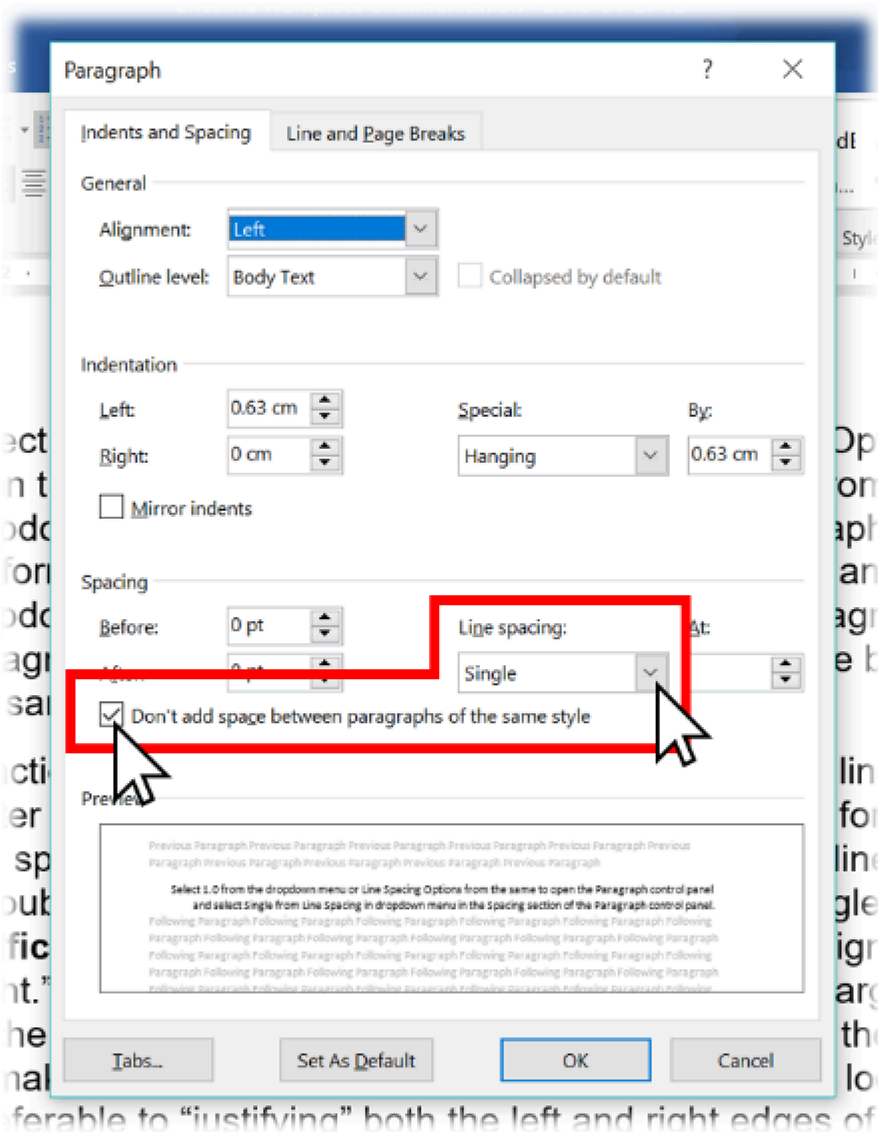


Figure 14.1: Where to click to get line-spacing options in the MS Word tool ribbon (above) and Paragraph control panel (right)

2. Select 1.0 from the dropdown menu or Line Spacing Options from the same to open the Paragraph control panel, and select Single from the Line Spacing dropdown menu in the Spacing section.
3. Perform the same two steps as above to get the Line and Paragraph Spacing dropdown menu, and select Remove Space After Paragraph or, from the Paragraph control panel, click on the “Don’t add space between paragraphs of the same style” checkbox and the Okay button at the bottom to apply the style.

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

Justification should ideally be left as the default left-aligned or “Left-justified / ragged right.” This means that all lines are flush to the left margin and the lines end wherever the last full word fits before the right margin sends (or “wraps”) the next word down to the next line, making each line vary in length so the right margin looks “ragged,” as you can see throughout this textbook. This is usually preferable to “justifying” both the left and right edges of the text so that they align perfectly along both the left and right margins, as in the paragraph below. While this may look clean like newspapers often do with their columns, it does so by adding space between the words within each line, and since every line varies in length without justification, every line with it will vary in the amount of space added between words. Some lines that would be short without justification look awkward with it because the space between some words is greater than the span of small words.

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

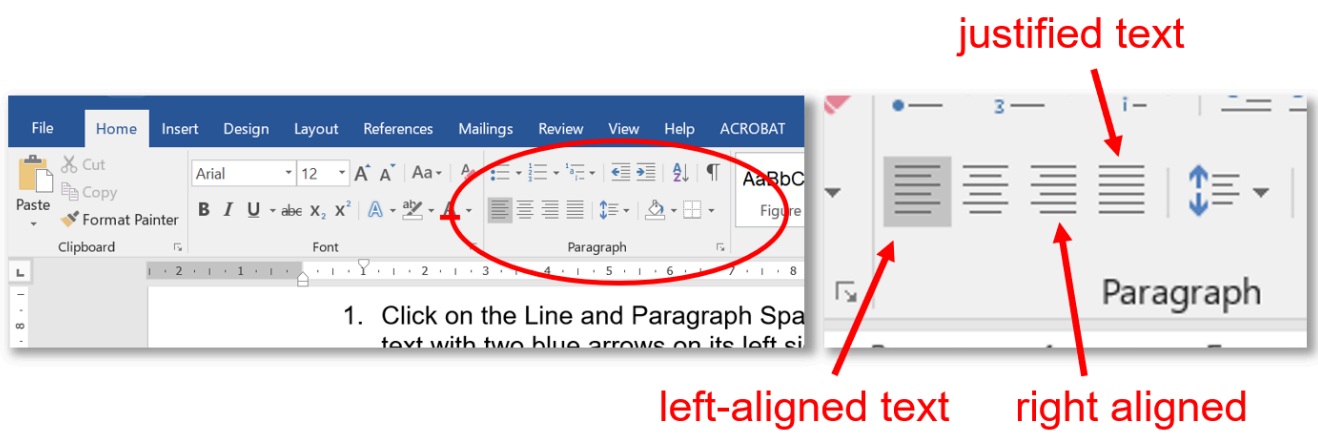


Figure 14.2: Where to click to select text justification or left-aligned ("ragged right") text in the MS Word Home menu tool ribbon

Lists

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

Use Bulleted Lists for:	Use Numbered Lists for a:
• An unprioritized collection of related points • Points on a presentation slide (e.g., PowerPoint) for easier readability	• 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 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; for instance, each point in the three bulleted lists in this section (including the present one) is a noun phrase (i.e., it begins with a noun) and the numbered list above, as a step-by-step procedure, is a sequence of imperative sentences (i.e., each begins with a verb: "Click," "Select," "Perform").

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

Visual Aids

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

- **Aesthetic considerations:**
    - Does the image look good?
    - Are the colours complementary?
- **Technical considerations:**

    - Is the image resolution of sufficiently high quality?
    - Or is it too pixelated to use?

- **Legal considerations:**
    - Does the image's copyright licence permit or forbid use by others?
    - Am I using the image for educational or commercial purposes?

- **Design considerations:**
    - Is it big enough to see?
    - Is it placed appropriately?

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

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

- **Technical guidelines:**
    - Screen resolution must be at least 72dpi (dots per inch), the internet standard; anything less than 72 may appear pixelated even on the screen, especially if maximized in size across the page.
    - Images in documents that will be printed should be 300dpi to avoid appearing pixelated on paper.
    - Preferred image file types include JPEG (.jpg) and PNG (.png). The latter includes the possibility of contouring so that the image doesn't necessarily have to be a square or rectangle.

- **Legal guidelines:**
    - To stay on the right side of copyright legislation, searching online for images that are free to use is easy by including licensing status in an advanced Google Image search. From the Google Images

search screen:

1. Click on the Settings spring-up menu at the bottom right.
2. Select Advanced Search.
3. Scroll down and click on the “usage rights” dropdown menu at the bottom.
4. Select “free to use or share” or whatever licensing status suits your purposes.

- Otherwise, you can acquire the right to use images for commercial purposes by purchasing them from stock photo vendors such as Getty Images, Adobe Stock, or Shutterstock.

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

- On a Windows-based computer:

1. Open the included Snipping Tool (Microsoft Support, 2017) to turn the cursor into crosshairs.
2. Click and drag the crosshairs to select the desired portion of the screen for capturing; when you release the cursor, the captured image will open immediately in the clipboard. Ensure that you’ve included only the elements necessary, rather than the whole screen, plus a short span of margin on each side.
3. Save the image in a folder from the clipboard or add it directly to the document by switching immediately to the document window (Alt + tab) and pasting it (ctrl. + v) wherever you’ve placed your cursor.

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

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

Interactive Elements

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

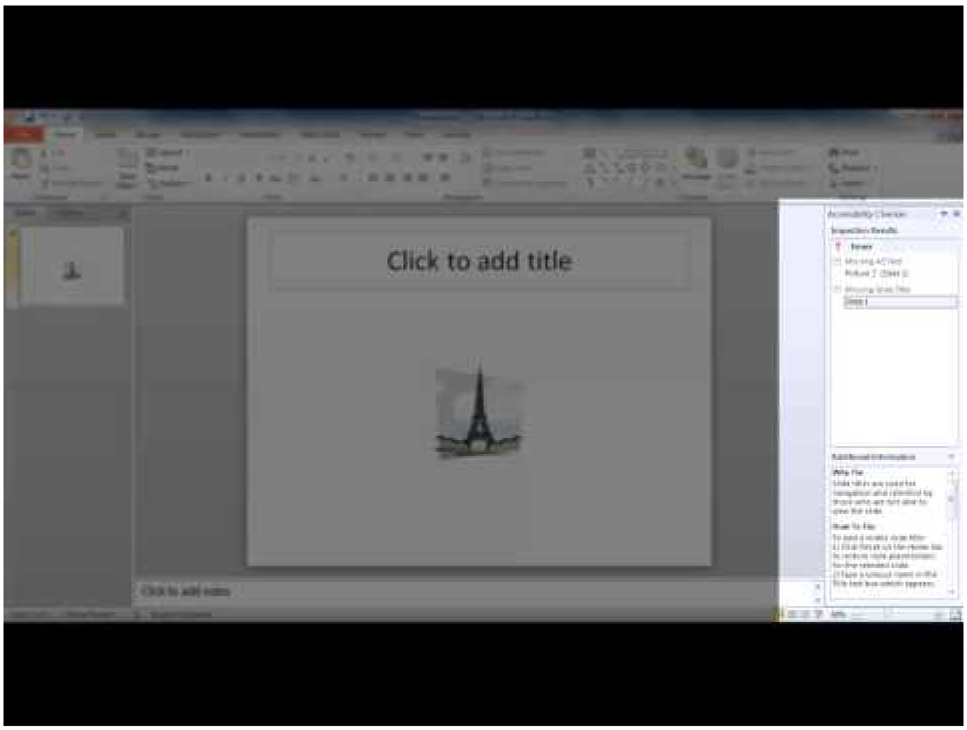
Balancing Text and Whitespace

Another consideration that helps a reader find their way around a page is the balance of text and whitespace, which is simply a gap unoccupied by text or graphic elements. The enemy of readability is a wall of text that squeezes out any whitespace, whereas a well-designed document uses whitespace to usher the reader's eyes towards units of text. Margins should be 3cm or 1″ (2.54cm), which are the default margin sizes in most word processors' (e.g., Microsoft Word's) blank 8.5″x11″ document. Margins also focus attention on the text itself, which makes any crowding of the margins an offense to good design. An attempt to cram more information into a one-page résumé by edging further and further into the margins, for instance, follows the law of diminishing returns: the hiring manager might take your sacrifice of the document's readability as a sign of selfishness—that you place your own needs above that of your audience, which suggests you would do the same to the customers and management if it suited you.

Making Accessible, AODA-compliant Documents

The Accessibility for Ontarians with Disabilities Act (2005) sets out guidelines for how workplaces can help people with disabilities, including accommodations that extend to document design. Many of the recommendations covered in this unit, such as font size and colour, are justified as accommodations to people with even mild visual impairment. Someone with colour blindness, for instance, may be confused if you use coloured text alone as an organizing principle, which is why you should use colour only to enhance text readability while using other means of organization such as boldface type. Not only must you accommodate such individuals, but also those whose severity of impairment requires that they use assistive technologies such as screen readers that convert text to 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 to go to File and, in the Info tab, select the "Check for Issues" button in the Inspect Document section. It will identify accessibility problems in your document as well as suggest fixes (watch the video below for a demonstration). For instance, if you have a photo without alt text, it will prompt you to write a caption by right-clicking on the image, selecting "Edit Alt Text…" from the dropdown menu, and writing a one- or two-sentence description of the image so that users with screen readers will be able to hear a description of the image they can't see very well or at all. See the [Creating Accessible Documents](https://pressbooks.senecacollege.ca/fashionbuscomm/?p=77) resources (Algonquin College, 2013) for more on how to make your documents AODA compliant.



A YouTube element has been excluded from this version of the text. You can view it online here: https://pressbooks.senecacollege.ca/fashionbuscomm/?p=77

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 colours.

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PART V THE WRITING PROCESS 4 — EDITING

The final stage of the writing process is managing your readers' impressions by editing your draft from beginning to end. This involves first returning to the start of the writing process and assessing where your document is in relation to the purpose you set out to achieve for 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 just altogether deleting paragraphs that you meticulously proofread with a fine-tooth comb.

In this part, we will cover:

- Substantial Revisions
- Proofreading for Mechanics

Unit 15: Substantial Revisions

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. After some time, return to the document pretending it was written by someone else and you are its target audience. 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 towards 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

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 15.1: 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
2. Organization	Organizing that material
3. Style	Stylizing it into effective sentences and paragraphs
4. Readability	Adding document design features

When reading with these lenses after taking a break from your work, approach it more critically as if you were the reader you're catering to, not as the words' sentimental and protective parent.

When evaluating for content, consider what your audience needs to understand. 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 you got carried away with digressions that would send your reader down off-topic dead ends. Have you given your audience more than what they need so that your document would overwhelm them? More specifically, have you fact-checked all of your information to ensure that it is true and, if based on sources that must be documented, accurately cited and referenced?

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 in Step 3.2 of the writing process, you did so from a preliminary understanding of your topic. As you 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?

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? 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 towards the substantial revisions explained below.

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., CBC) that the reader hasn't seen fully spelled out yet must be fully spelled out here and can be abbreviated later in the text.

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-counts in case your document exceeds the acceptable range. If it does, then you must be ruthless about chopping anything unnecessary out of your draft.

Trimming Your Draft

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 1000-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.

The first trick to paring down your writing is to really want to make every word count and to see excess words as 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. Time spent writing or reading tiresome information 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. Follow the practical advice in the subsections below to trim your writing effectively.

1. Mass-delete Whatever Doesn't Belong

The first practical step towards 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. 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 towards 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 upset the reader by signalling that the rest of the message will contain some time-wasting text. 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 15.2 below. Unless you have good reason to do otherwise, always replace the former with the latter in your writing.

Table 15.2: Replace Unnecessarily Wordy Phrases with Concise Equivalents

Replace These Wordy Phrases	with These Concise Equivalents
due to the fact that	because
not later than July 7 at this present moment in time	by July 7 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
on a weekly basis	weekly
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 15.2 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 in red if they appear in combination with those in blue:

- ~~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 15.2 above)
- repeat ~~again~~ (is this déjà vu?)

5. Create a positive tone

A negative tone is unlikely to persuade readers and will not be well received.
Improving tone:

- Place yourself in the reader's position and focus on their perspective rather than your own.
- Use positive language.
- Be courteous.

Negative Tone	Positive Tone
.....is facing severe economic hardships. Layoffs appear to be imminent. We cannot process your order because you failed to specify the model numbers.	.....is facing financial difficulties. We hope to avoid laying off workers. Please specify the model numbers you require so we can process your order.

6. 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 the 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.

~~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. Favour Short, Plain Words and Revise jargon or bureaucratic expressions

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. 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 jargon 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 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.

For business writing, simplifying language is more effective. Table 15.3 shows examples of commonly used complicated or bureaucratic expressions and their simpler alternative.

Table 15.3:Plain and Simple Language

Complicated or Bureaucratic Expression	Simpler Alternative
in lieu of	instead of
whereas solicit	because ask for
apparent	clear
as per your request	as you requested
commence	begin, start
consolidate	combine
ascertain	find out
demonstrate	show
disseminate	distribute, send
endeavour	try
erroneous	wrong
expedite	speed up
facilitate	help
implement	carry out
inception	start
leverage	use
optimize	perfect
terminate	end
proximity	near
finalize	about
subsequent	complete
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.

Definitely don't use longer words when they're 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 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. 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. There are legitimate uses of the passive voice, however, 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 vague than the active voice, however, readers prefer the latter most of the time and so should you.

Yet another strategy for extending the wordcount 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 <u>discussion</u>** about the new budget constraints.	The committee **<u>discussed</u>** the new budget constraints.
We **will make a <u>recommendation</u>** to proceed with the investment option.	We will **<u>recommend</u>** proceeding with the investment option.
They **handed down a <u>judgment</u>** that the offer wasn't worth their time.	They **<u>judged</u>** that the offer wasn't worth their time.
The regulator will **grant <u>approval</u> of** the new process within the week.	The regulator will **<u>approve</u>** the new process within the week.
He always **gives me <u>advice</u>** on what to say to the media.	He always **<u>advises</u>** me on what to say to the media.
She's **giving** your application **a <u>pass</u>** because of all the errors in it.	She's **<u>passing</u>** on your application because of all the errors in it.

You can tell that the above sentences 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, wordcount-extending strategies throughout this subsection is bad enough on its own. In combination, however, 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:

The committee **had a <u>discussion</u>** about the new budget constraints.	The committee **<u>discussed</u>** the new budget constraints.
We **will make a <u>recommendation</u>** to proceed with the investment option.	We **will <u>recommend</u>** proceeding with the investment option.
They **handed down a <u>judgment</u>** that the offer wasn't worth their time.	They **<u>judged</u>** that the offer wasn't worth their time.
The regulator will **grant <u>approval</u> of** the new process within the week.	The regulator will **<u>approve</u>** the new process within the week.
He always **gives me <u>advice</u>** on what to say to the media.	He always **<u>advises</u>** me on what to say to the media.
She's **giving** your application **a <u>pass</u>** because of all the errors in it.	She's **<u>passing</u>** 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. In combination, however, writing riddled with 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.

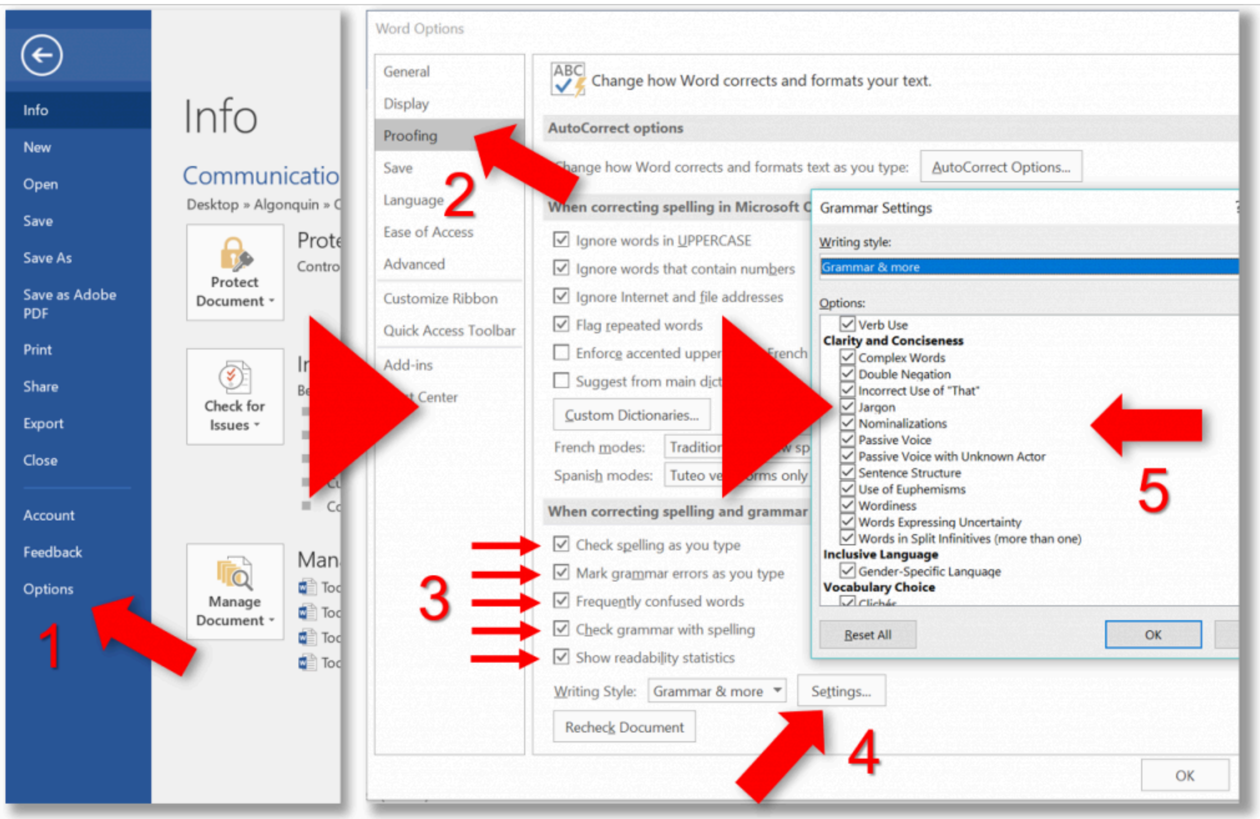

Figure 15.1: Setting up your MS Word Grammar, Style, and Spellchecker

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.
7. Go back and proofread the text to ensure accuracy.

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 favour by breaking up your sentences and simplifying your word choices.

Rather than complicate a message 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 need to fasten pages together and unfasten them. A paperclip does it with just a couple inches of thin, machine-bent wire. We should all aspire to make our language as elegant as a paperclip so that we can live 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 it, reorganize, and trim it as necessary to meet the needs of the target audience.

Exercises

Emphasizing the positive

1. We don't make refunds on returned merchandise that is soiled.
2. Because we are temporarily out of Baby Cry dolls, we won't be able to ship your order for 10 days.

Replace the unflattering term in *italics*.

3. Jim Riley is too (*incompetent*) for that kind of promotion.

Courteous Communication

4. You neglected to sign the enclosed document.

Selecting Words

Replace vague phrases that are underlined. Make up details that you might need.

5. We will be opening our new facility sometime this spring.
6. You can now purchase our new leaf blower at a substantial savings.

In the following sentences, replace long, complicated words.

7. Management (inaugurated) the recycling policy six months ago.
8. You can convey the same meaning without (utilizing) the same words.
9. I have to wait until payday to (ascertain) whether I got the raise.

Rewrite the following sentences, replacing obsolete phrases with up to date versions.

10. Even though it will increase the price of the fence, we have decided to use the redwood in lieu of the cedar.

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Unit 16: Proofreading for Mechanics

Learning Objective

1. Proofread documents for spelling, formatting, grammar, clarity, wordiness and incorrect use of words.

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. Remember that consistency throughout your document is the rule. Consider the following as your guide for how to get your writing mechanics right.

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.

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. **T**hese pretzels are making me thirsty.

  - Full-sentence quotation even if it appears after a signal phrase; e.g., A great American humourist put it best when he said, "**T**ravel 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: **T**reat 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 16.2 below for several example titles)
- The first letter of proper nouns, which include the types given below in Table 5.5.1

Table 16.1: 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)	Beautiful Losers, Star Wars, The Onion, Overwatch, the Ottawa Citizen
Days of the week, months, holidays	Monday, November, Labour 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

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: **l**et's go **S**outh to visit the **P**resident and stay with **v**ice **p**resident Frito.

The fix: **L**et's go **s**outh to visit the **p**resident and stay with **V**ice **P**resident Frito.

The fix: **L**et's go **s**outh to visit **P**resident Comacho and stay with Frito, his **v**ice **p**resident.

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 **o**ffice, such as Power**p**oint.

The fix: In addition, **I am** proficient in the use of Microsoft **O**ffice, such as Power**P**oint.

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 Power**P**oint or You**T**ube.

Incorrect: I had to read the textbook Communication **A**t Work for my Algonquin **c**ollege **c**ommunications course in the **a**ccounting program.

The fix: I had to read the textbook Communication **a**t Work for my Algonquin **C**ollege **C**ommunications course in the **A**ccounting 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.

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 flue 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 following resources:

- The *Guide to Grammar & Writing's* Capitalization page and Capitalization I and Capitalization II digital-activity exercises linked at the bottom (Darling, 2014a)
- The *Guide to Grammar & Writing's* Abbreviations page and *Guide to Grammar & Writing*'s Abbreviations I digital-activity exercise linked at the bottom (Darling, 2014b)
- *Purdue OWL's* A Little Help with Capitals page (Berry & Brizee, 2013)
- *The Grammar Book's* Capitalization Rules page (Straus, 2014)

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 cheque." 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 §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 16.2 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 16.2: Italicized Titles

Type of Work	Examples
Book, legislation	*Elements of Style*, *A Brief History of Time*, *The Handmaid's Tale*, *The Great Gatsby*, *The Copyright Act*
Magazine	*Maclean's*, *The Walrus*, *Chatelaine*, *MoneySense*, *Canadian Business*, *The Hockey News*, *Today's Parent*, *Flare*
Newspaper	*The Globe and Mail*, *the Toronto Star*, *National Post*, *Montreal Gazette*, *Ottawa Citizen*, *Time Colonist*
Website (APA)	*YouTube*, *Wikipedia*, *Facebook*, *Instagram*, *The Onion*
Film	*Casablanca*, *Thirty Two Short Films About Glenn Gould*
TV show	*Dragons' Den*, *Hockey Night in Canada*, *Orphan Black*
Play, long poem	*The Rez Sisters*, *Romeo & Juliet*, *Waiting for Godot*, *Paradise Lost*
Album, opera	Drake's *Views*, Arcade Fire's *Funeral*, Alanis Morissette's *Jagged Little Pill*, Mozart's *The Magic Flute*
Works of art	*Mona Lisa*, *The School of Athens*, *The Starry Night*, *Voice of Fire*
Video game	*Tetris*, *Grand Theft Auto V*, *Super Mario Bros.*, *Minecraft*
Ships, airplanes	the *Titanic*, *Bismarck*, *Hindenburg*, *Enola Gay*
Legal cases	*Roe v. Wade*, *Brown v. Board of Education*, *Baker v. Canada*

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)

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 informal and technical writing, however, using only figures ensures accuracy, consistency, and brevity.

Table 16.3: Formal Numbering Conventions

Convention	Examples (Note: Bold would not be used in the text. It is used here for illustrations purposes only)
Words	only **one** person, **ten** reasons
Figures	**11** people, **40** cars, **127** hours, **330** lbs. $**39.99**, **6.12** litres, **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 (*in formal docs*), **8%** increase *(in business forms and technical docs*), **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**am, noon, **1:15**pm, **5-6**pm, **10:30-11**am, **11:30**am-**1**pm (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**
Weights and measures	Andre weighed over **200 lbs.** by age 12 and over **500 lbs**. by 40. The room is **10'** by **12'** in a **2,400** sq. ft. house., **8 metres** *(in formal docs*), **24km** *(in informal and technical docs)*
Ages	Little Nicky was **3** years and **7** months when his family moved. 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. (*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.)*

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 1**9,000,000,000,000,000,000,000** 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.**

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 catalogued **thirty-four** new types of spiders, 662 new types of beetles, and 178 new types of ants.

The fix: The one expedition catalogued **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 the following resources:

- Purdue OWL's Writing Numbers (Berry, 2018)
- 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.

Exercise

1. Review the "Proofreading Guide" posted to blackboard for a summary of some of the key things to check for when proofreading.

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PART VI ELECTRONIC WRITTEN COMMUNICATION

This part will cover the most common electronic channels because for routine business use. Most students would have grown up with the text messaging and social media channels, which gives them a sense of familiarity but with that comfort comes years of bad habits. This part will attempt to provide students a way to professionalize those communication skills. Email deserves a close look because it is the most widespread and established of the electronic forms. Since so much of our lives are wrapped up in electronic interaction, reviewing the netiquette principles established at the outset of the electronic communications revolution can actually help us move forward as we look at the newest and fastest communication channels, texting and instant messaging.

In this part, we will cover:

Unit 17: Emailing

Learning Objective

1. Identify characteristics of effective professional emails.

Electronic mail, widely known as "e-mail" or just "email," is by volume the most popular written communication channel in the history of human civilization. With emails being so cheap and easy to send on desktop and laptop computers, as well as on mobile phones and tablets, a staggering 280 *billion* emails are sent globally per *day* (Radicati, 2017)—that's over a hundred trillion per year. Most are for business purposes because email is such a flexible channel ideal for anything from short, routine information shares, requests, and responses, to important formal messages delivering the content that letters and memos used to handle. Its ability to send a message to one person or as many people as you have addresses for, integrate with calendars for scheduling meetings and events, send document attachments, and send automatic replies makes it the most versatile communication channel in the workplace.

This mind boggling quantity of 3.2 million emails sent per second doesn't necessarily mean that quality is a non-issue for email, however. Because it has, to some extent, replaced mailed letters for formal correspondence, emails related to important occasions such as applying for and maintaining employment must be impeccably well written. Your email represents you in your physical absence, as well as the company you work for if that's the case, so it must be both good, well-written and appropriate.

Begin by ensuring that you really need an email to represent you because emailing merely to avoid speaking in person or calling by phone can do more harm than good. If an email is necessary, however, then it must be effective. As people who make decisions about your livelihood, the employers and clients you email can be highly judgmental about the quality of your writing. To them it's an indication of your professionalism, attention to detail, education, and even intelligence. The writing quality in a single important email can be the difference between getting hired and getting fired or remaining unemployed.

Email Parts

- Message Closing
- Closing Salutation
- E-signature
- Attachments
- Before Sending your Email

Before delving into this detail, however, let's review the advantages, disadvantages, and occasions for using email given earlier in unit 6 on channel selection.

Table 17.1 Excerpt: Email Pros, Cons, and Proper Use

Advantages	**Disadvantages**	**Expectations**	**Appropriate Use**
• Delivers messages instantly anywhere in the world to anyone with an internet connection and email address you have • Sends to one or many people at once, including secondary audiences CC'd or BCC'd • 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 free (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	• Gives the illusion of privacy: your messages can be forwarded to anyone, monitored by your company or an outside security agency, retrieved with a warrant, or hacked even if both you and receiver delete them • Can be slow when used for back-and-forth dialogue • Tone may be 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 hitting "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	• 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	• Quickly deliver a message that doesn't need an immediate response • Send a message and receive a response in writing as evidence for future review (lay down a paper trail) • Use when confidentiality isn't necessary • Send electronic documents as attachments • Send the same message to several people at once, including perhaps people whose email address you need to hide from the others (using BCC) to respect their confidentiality

Email Address

Just as with physical "snail mail" you pick out of your Canada Post mailbox, the first thing you see when an email arrives in your inbox is who it's from. The address determines immediately how you feel about that email—whether excited, uninterested, curious, angry, hopeful, scared, or just obliged to read it. Your email address will create similar impressions on those you email depending on your relationship to them. It's therefore important that you send from the right email address.

If you work for a company, obviously you must use your company email address for company business. Customers expect it. Bear in mind that in a legal and right-to-privacy sense, you don't own these emails. If they exist on a company server, company administrators can read any of them if they are investigating a breach of company policy or criminal activity (Office of the Privacy Commissioner of Canada, 2010). This means that you must be careful not to write anything in an email that could compromise your employability.

If you're writing on your own behalf for any business or job-application purposes, it's vital that you have a respectable-looking email address. Using a college or university email is a good bet because it proves that you indeed are attending or attended a post-secondary institution when you've made that claim in your application. If your school email address has expired, however, it's worth starting an account for career purposes that has a straightforward address showing your name. If your name is Justin Trudeau, for instance, your ideal email address would simply be justin.trudeau@ with one of the major email providers like Gmail or Outlook/Hotmail. Of course, many 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 big, such as more than 25 characters.

What's fundamentally important, however, is that you retire your teenage joke email address. If you have one of these, it may have scored some points with friends back in high school, but now that you're an adult, it will only do irreparable harm to your employability prospects if you're using it for job applications. Any potential employer or other professional who gets an email from pornstar6969baby@whatever.com, speedball.playa@hotmail.com, or crazy.unicorn.girl@yahoo.com is going to delete it without even opening it.

Also, forget about clinging to the fantasy of having only one email address to deal with. Just as your demeanour and language style changes in social, family, and professional contexts, you should likewise hold multiple email accounts—one for work, one for school, and one for personal matters. Each of the 3.8 billion email users in the world has an average of 1.7 email accounts (Radicati, 2017). It's likely that you will have more than three throughout your life and retire accounts as you move on from school and various workplaces. If you can manage it, you can set up forwarding so that you can run multiple accounts out of one, except where company or institutional policy requires that you work entirely within a designated email provider or client.

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Timestamp & Punctuality

The timestamp that comes with each email means that punctuality matters and raises the question of what the expectations are for acceptable lag time between you receiving an email and returning an expected response. Of course, you can reply as soon as possible as you would when texting and have a back-and-forth recorded in a thread. What if you need more time, however?

Though common wisdom used to be that the business standard is to reply within 24 hours, the availability of email on the smartphones that almost everyone carries in their pockets has reduced that expectation to a few hours. Recent research shows that half of email responses in business environments in fact comes within two hours (Vanderkam, 2016). Some businesses have internal policies that demand even quicker responses because business moves fast. If you can get someone's business sooner than the competition because you reply sooner, then of course you're going to make every effort to reply right away. Of course, the actual work you do can get in the way of email, but you must prioritize incoming work in order to stay in business.

What if you can't reply within the expected number of hours? The courteous course of action is to reply as soon as possible with a brief message saying that you'll be turning your attention to this matter as soon as you can. You don't have to go into detail about what's delaying you unless it's relevant to the topic at hand, but courtesy requires that you at least give a timeline for a fuller response and stick to it.

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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 word count range here is important because your subject line shouldn't be so vague that its one or two words will be misleading, nor so long and detailed that its eight-plus words will be cut off by your inbox layout. Though it must be specific to the email topic, details about specific times and places, for instance, should really be in the message itself rather than in the subject line (see Table 17.2 below). Also, avoid using words in your subject line that might make your email look like spam. A subject line such as *Hello* or *That thing we talked about* might appear to be a hook to get you to open an email that contains a malware virus. This may prompt the recipient to delete it to be on the safe side, or their email provider may automatically send it to the junk mail box, which people rarely check. It will be as good as gone, in any case.

Table 17.2: Subject Line Length

Too Short	**Just Right**	**Too Long and Detailed**
Problem	Problem with your product order	Problem with your order for an LG washer and dryer submitted on April 29 at 11:31 p.m.
Meeting	Rescheduling Nov. 6 meeting	Rescheduling our 3 p.m. November 6 meeting for 11am November 8
Parking Permits	Summer parking permit pickup	When to pick up your summer parking permits from security

Stylistically, notice that appropriately sized subject lines typically abbreviate where they can and avoid articles (*the*, *a*, *an*), capitalization beyond the first word (except for proper nouns), and excessive adjectives.

Whatever you do, don't leave your subject line blank. Even if you're just firing off a quick email to send an attachment to yourself, the subject line text will be essential to your ability to retrieve that file later. Say you find yourself desperately needing that file months or even years later because the laptop it was saved on was stolen or damaged beyond repair, which you couldn't have predicted at the time you sent it. A search in your email provider for words matching those you used in the subject line will quickly narrow down the email in question. Without words in the subject line or message, however, you'll have no choice but to guess at when you sent the email and waste time going through page after page of sent-folder messages looking for it. A few seconds spent writing a good subject line can potentially save hours of frustrating searches.

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Opening Salutation & Recipient Selection

When a reader opens your email, its opening salutation indicates not only who the message is for but also its level of formality. As you can see in Table 17.3 below, opening with *Dear [Full Name]* or Greetings, *[Full Name]*: strikes an appropriately respectful tone when writing to someone for the first time in a professional context. When greeting someone you've emailed before, *Hello, [First name]*: maintains a semi-formal tone. When you're more casually addressing a familiar colleague, a simple *Hi [First name]*, is just fine.

Table 17.3: Opening Salutation Examples

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

Notice that the punctuation includes a comma after the greeting word and a colon after their name for formal and semiformal occasions. Informal greetings, however, relax these rules by omitting the comma after the greeting word and replacing the colon with a comma. Don't play it both ways with two commas; *Hi, Jeremy*, appears too crowded with them.

Depending on the nature of the message, you can use alternative greeting possibilities. If you're thanking someone for information they've sent you, you can do so right away in the greeting; e.g., *Many thanks for the contact list, Maggie*. When your email exchange turns into a back-and-forth thread involving several emails, it's customary to drop the salutation altogether and treat each message as if it were a text message even in formal situations.

Formality also dictates whether you use the recipient's first name or full name in your salutation. If you're writing to someone you know well or responding to an email where the sender signed off at the bottom using their first name, they've given you the green light to address them by their first name in your response. If you're addressing someone formally for the first time, however, you may want to strike an appropriately respectful tone by using their full name. If you're addressing a group, a simple *Hello, all: or Hello, team:* will do.

Be careful when selecting recipients, however. First, spell their name correctly because email addresses often have non-standard combinations of name fragments and numbers; any typos will result in the server bouncing your email back to you as being unsent. Waiting before entering their name in the recipient or "To" field is also wise in case you accidentally hit the Send button before you're finished drafting your email. If you prematurely send an email, a quick follow-up apologizing for the confusion and the completed message is the best damage control you can do, but it requires immediate action. Another preventative measure is to compose a message offline, such as in an MS Word or simple Notepad document devoid of formatting, then copy and paste it into the email field when you're ready to send.

If you have a primary recipient in mind but want others to see it, you can include them in the CC (carbon/complementary copy) line. (If confidentiality requires that recipients shouldn't see one another's addresses, BCC [blind carbon copy] them instead.) Be selective with whom you CC, however. Yes, it's good to keep your manager in the loop, but you may want to do this only at the beginning and the end of a project's email "paper" trail. They will appreciate that things are under way and wrapping up but may get annoyed if their inbox is flooded with every little mundane back-and-forth throughout the process. If in doubt, speak with your manager about their preferences for being CC'd.

Never "reply all" so that everyone included in the "To" line and CC'd sees your reply unless your response includes information that everyone absolutely must see. If your manager sends some information to all 80 people in your department, for instance, your reply-all response that just acknowledges receipt with an "OK, thanks!" which is unnecessary in the first place, will anger 79 people who expected to see valuable information. If the first email was about a departmental meeting time though the location was yet to be determined, but you now have that information because you did the booking, of course you would reply all to provide that necessary follow-up.

Bear in mind that, concerning **email security**, no matter who you select as the primary or secondary (CC'd) recipients of your email, always assume that it may be forwarded on to other people, including those you might not want to see it. 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.

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Message Opening

Most emails will be direct-approach messages where you get right to the point in the opening sentence immediately below the opening salutation. As we saw in unit 11 on message organization, the **direct-approach** pattern does the reader a favour by not burying the main point under a pile of contextual background. If you send a busy professional on a treasure hunt for your main point, a request for information for example, don't blame them if they don't find it and don't provide the information you asked for. They might have given up before they got there or missed it when skimming, as busy people tend to do. By stating in the opening exactly what you want the recipient to do, however, you increase your chances of achieving that goal.

Table 17.4 Direct- vs. Indirect-approach Email Openings

Sample Direct Opening	Sample Indirect Opening
We have reviewed your application and are pleased to offer you the position of retail sales manager at the East 32nd and 4th Street location of Swansong Clothing.	Thank you very much for your application to the retail sales manager position at the East 32nd and 4th Street location of Swansong Clothing. Though we received a large volume of high-quality applications for this position, we were impressed by your experience and qualifications.

Indirect-approach emails should be rare and only sent in extenuating circumstances. Using email to deliver bad news or address a sensitive topic can be seen as a cowardly way of avoiding difficult situations that should be dealt with in person or, if the people involved are too far distant, at least by phone. Other circumstances that might force you to use the indirect approach for emails include the following:

- Needing to use persuasive techniques
- Having no other means of contacting the recipient
- Needing to get the email exchange in writing in case the situation escalates and must be handled as evidence by higher authorities
- Needing to deliver a large number of bad-news messages without having the time or resources to individually customize each, such as when you are sending rejection notices to job applicants (see the sample indirect opening in Table 17.4 above); out of expedience, it's understandable if these are boiler-plate responses

In such cases, the indirect approach means that the opening should use buffer strategies to ease the recipient into the bad news or set the proper context for discussing the sensitive topic.

Otherwise, your email must pass the **first-screen test**, which is that everything the recipient needs to see is visible in the opening without forcing them to scroll further down for it. Before pressing the Send button, put yourself in your reader's shoes and consider whether your message passes the first-screen test. If not, and if you have no good reason to take the indirect approach, then re-organize your email message by moving (copying, cutting, and pasting, or ctrl. + C, ctrl. + X, ctrl. + v) its main point up to make it the opening of your message.

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Message Body

Emails long enough to divide into paragraphs follow the three-part message organization where the message body supports the opening main point with explanatory details such as background information justifying an information request. With brevity being so important in emails, keeping the message body concise, with no more information than the recipient needs to do their job, is extremely important to the message's success. The message body therefore doesn't need proper three-part paragraphs. In fact, one-sentence paragraphs (single spaced with a line of space between each) and bullet-point lists are fine. If your message grows in length beyond the first screen, document design features such as bold headings help direct readers to the information they need. If your message gets any larger, moving it into an attached document is better than writing several screens of large paragraphs. Unlike novels, people don't enjoy reading emails per se.

Also keep email messages brief by sticking to one topic per email. If you have a second topic you must cover with the same recipient(s), sending a separate email about it can potentially save you time if you need to retrieve that topic content later. If the subject line doesn't describe the topic you're looking for because it was a second or third topic you added after the one summarized in the subject line, finding that hidden message content will probably involve opening several emails. A subject line must perfectly summarize all of an email's contents to be useful for archiving and retrieval, so sticking to one topic per email will ensure both brevity and archive retrieval efficiency.

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Message Closing

An email closing usually includes **action information** such as direction on what to do with the information in the message above and deadlines for action and response. If your email message requests that its nine recipients each fill out a linked Doodle.com survey to determine a good meeting time, for instance, you would end by saying, Please fill out the Doodle survey by 4 p.m. Friday, May 18. If the message doesn't call for action details, some closing thought (e.g., I'm happy to help. Please drop me a line if you have any questions) ends it without giving the impression of being rudely abrupt. Goodwill statements, such as Thanks again for your feedback on our customer service, are necessary especially in emails involving gratitude.

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Closing Salutation

A courteous closing to an email involves a combination of a pleasant sign-off word or phrase and your first name. As with the opening salutation, closing salutation possibilities depend on the nature of the message and where you want to position it on the formality spectrum, as shown in Table 6.1.8 below.

Table 17.5: Closing Salutation Examples

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

Your first email to someone in a professional context should end with a more formal closing salutation. Later emails to the same person can use the appropriate 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 17.5 that you capitalize only the first word in the closing salutation and add a comma at the end.

Including your first name after the closing salutation ends in a friendly way as if to say, "Let's be on a first-name basis" if you weren't already, greenlighting your recipient to address you by your first name in their reply. In your physical absence, your name at the end is also a way of saying, like politicians chiming in at the end of campaign ads, "I'm [name] and I approve this message." It's a stamp of authorship. Omitting it gives the impression of being abrupt and too busy or important to stop for even a second of formal niceties.

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E-signature

Not to be confused with an electronic version of your handwritten signature, the e-signature that automatically appears at the very bottom of your email is like the business card you would hand to someone when networking. Every professional should have one. Like a business card, the e-signature includes all relevant contact information. At the very least, the e-signature should include the details given in Table 17.6 below.

Table 17.6: E-signature Part

E-signature Parts	Examples
Full Name, Professional Role Company Name Company address Phone Number(s) Company website, Email address	**Jessica Day**, Graphic Designer UXB Designs 492 Atwater Street Toronto, ON M4M 2H4 416-555-2297 (c) uxb.com | jessica.day@uxb.com
Full Name, Credentials Professional Role Company Name Company Address Phone Number(s) Company website, email address	**Winston Schmidt**, MBA Senior Marketing Consultant Tectonic Global Solutions Inc. 7819 Cambie Street, Vancouver, BC V5K 1A4 604.555.2388 (w) | 604.555.9375 (c) tectonicglobal.com | m.bennington@tgs.com

Depending on the individual's situation, variations on the e-signature include putting your educational credentials after your name (e.g., MBA) on the same line and professional role on the second line, especially if it's a long one, and the company address on one line or two. Also, those working for a company usually include the company logo to the left of their e-signature. Some instead (or additionally) add their profile picture, especially if they work independently, though this isn't always advisable because it may open you to biased reactions. Other professionals add links to their social media profiles such as LinkedIn and the company's Facebook and Twitter pages. For some ideas on what your e-signature could look like, simply image-search "email e-signature" in your internet browser's search engine.

If you haven't already, set up your e-signature in your email provider's settings or options page. In Gmail, for instance, click on the settings cog icon at the top right, select *Settings* from the dropdown menu, scroll down the *General* tab, and type your e-signature in the Signature field. Make absolutely sure that all of the details are correct and words spelled correctly. You don't want someone to point out that you've spelled your professional role incorrectly after months of it appearing in hundreds of emails.

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Attachments

Email's ability to help you send and receive documents makes it an indispensable tool for any business. Bear in mind a few best practices when attaching documents:

- Always **announce an attachment** in an email message with a very brief description of its contents. For instance, Please find attached the minutes from today's departmental meeting might be all you write between the opening and closing salutations.
- **Never leave a message blank** when attaching a document in an email to someone else. Your message should at least be like the one given above. Of course, including a message is up to you if you're sending yourself an attachment as an alternative to using a dedicated cloud storage service like Google Drive or Microsoft OneDrive. Even if it's just for yourself, however, at least including a subject line

identifying the nature of the attachment will make locating the file easier months or even years later.

- Ensure that your **attachment size**, if it's many megabytes (MB), is still less than your email provider's maximum allowable for sending and receiving. Gmail and Yahoo, for instance, allow attachments up to 25 MB, whereas Outlook/Hotmail allow only 10 MB attachments. However, files that are gigabytes (GB) large can be shared by using email to permit access to them where they're hosted in cloud storage services such as Google Drive, Microsoft OneDrive, Dropbox, and many others that have varying limits from 5 GB for no-cost to 10 TB for paid storage (Khanna, 2017).
- Always **check to ensure that you've attached a document** as part of your editing process. It shows that you lack attention to detail if your recipient responds to remind you to attach the document. Some of the more sophisticated email providers will remind you to do this when you hit the Send button if you've mentioned an attachment in your message but haven't yet actually attached it. If you get into the habit of relying on this feature in one of your email providers (e.g., your personal Gmail account) but are on your own in others (e.g., your work or school email provider), the false sense of security can hurt you at some point when using the latter.

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Before Sending Your Email

Before hitting the send button, follow through on the entire writing process, especially the Editing stage with its evaluation, revision, and proofreading sub-stages. Put yourself in your reader's position and assess whether you've achieved the purpose you set out to achieve in the first place. Evaluate also if you've struck the appropriate tone and formality. If you're aware that your tone is too angry, for instance save the message in the drafts folder and take time to cool down by focusing on other business for a while. When you come back to your email draft the next day, you will usually find that you don't feel as strongly about what you wrote the day before. Review the advice about netiquette in section 6.2, then replace the angry words with more carefully chosen expressions to craft a more mature response before hitting the send button. You'll feel much better about this in the end.

After revising generally, **always proofread** an email. In any professional situation, but especially in important ones related to gaining and keeping employment, any typo or error related to spelling, grammar, or punctuation can cost you dearly. A poorly written email is insulting because it effectively says to the recipient: "You weren't important enough for me to take the time to ensure that this email was properly written." Worse, poor writing can cause miscommunication if it places the burden of interpretation on the reader to figure out what the writer meant to say if that's not clear. If the recipient acts on misinterpretations, and others base their actions on that action, you can soon find that even small errors can have damaging ripple effects that infuriate everyone involved.

Table 17.7: Editing a Poorly Written Information Request Email

Poorly Written Email Example	Improved Email Draft
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	Hello, Professor Morgan: Could you please clarify why I failed the previous assignment? 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 reason and whether there's anything I can do to make up for the mark. I assure you it won't happen again, and I'll pay closer attention to the syllabus deadlines from now on. Much appreciated, Taylor

The poorly written draft has the look of a hastily and angrily written text to a "frenemy." An email to a superior, however, calls for a much more formal, tactful, courteous, and apologetic approach. The undifferentiated wall of text that omits or botches standard email parts such as opening and closing salutations is the first sign of trouble. The lack of capitalization, poor spelling (e.g., *councilor* instead of *counsellor*), run-on sentences and lack of other punctuation such as apostrophes for contractions, as well as the inappropriate personal detail all suggest that the writer doesn't take their studies seriously enough to deserve any favours. Besides tacking on a question at the end, one that could be easily answered by reading the syllabus, the writer is ultimately unclear about what they want; if it's an explanation for why they failed, then they must be upfront about that. The rudeness of the closing is more likely to enrage the recipient than get them to deliver the requested information.

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 suggest that the student, despite their faults, is well aware of how to communicate like a professional to achieve a particular goal.

After running such a quality-assurance check on your email, your final step before sending it should involve protecting yourself against losing it to a technical glitch. Get in the habit of copying your email message text (ctrl. + A, ctrl. + C) just before hitting the Send button, then checking your Sent folder immediately to confirm that the email sent properly. If your message vanished due to some random malfunction, as can happen occasionally, immediately open a blank MS Word or Notepad document and paste the text there (ctrl. + V) to save it. That way, you don't have to waste five minutes rewriting the entire message after you solve the connectivity issues or whatever else caused the glitch.

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.

Exercise

1. View the Ted Talk at the link below on some tips on "How to Write an Email".

Ted Talk "How to Write an Email"

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Unit 18: Netiquette and Social Media

Learning Objective

1. Discuss emerging netiquette standards in social media used for professional purposes.

We create and curate personal profiles, post content and comments, and interact via social media as a normal part of both our personal and professional lives. How we conduct ourselves on the open internet can leave a lasting impression, one not so easily undone if it's regrettable. The hilarious but compromising selfie you posted on Instagram five years ago is still there for your potential employer to find, judge for what it says about your professionalism, and speculate about what customers might think if they saw it too. That sarcastic but not-so-PC reply to a public post on Facebook or Twitter in a heated moment a decade ago can come back to haunt you. We're all learning as we go in this new media environment, but any mistakes we make along the way, no matter how much we've matured since, are still there for all to see and can have lasting impacts on our careers. Many candidates for political office have been taken down by their past social-media posts and the agents tasked with digging them up (Harris, 2015), and you can be sure that untold numbers of job applicants have similarly scuppered their chances with similar cavalier shares. Some guidance about what can be done about those mistakes, as well as how to conduct ourselves properly moving forward, can help improve your employability (adapted from *Business Communication for Success*, 2015).

Shea's Netiquette

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

- Remember the human on the other side of the electronic communication.
- Adhere to the same standards of behaviour online that you follow in real life.
- Know where you are in cyberspace.
- Respect other people's time and bandwidth.
- Make yourself look good online.
- 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)](#).

Legal Responsibilities

Your writing in a business context means that you represent yourself and your company. What you write and how you write it can be part of your company's success but can also expose it to unintended consequences and legal responsibility. When you write, keep in mind that your words will keep on existing long after you have moved on to other projects. They can become an issue if they exaggerate, state false claims, or defame a person or legal entity such as a competing company. Another issue is plagiarism, using someone else's writing without giving credit to the source. Whether the "cribbed" material is taken from a printed book, a website, or a blog, plagiarism is a violation of copyright law and may also violate your company policies. Industry standards often have legal aspects that must be respected and cannot be ignored. For the writer this can be a challenge, but it can be a fun challenge with rewarding results.

The rapid pace of technology means that the law cannot always stay current with the realities of business communication. Computers had been in use for a couple of decades before the Copyright Act of 1985 was amended in 1997 to deal with internet-enabled copyright infringement. Technology advanced even further before the next major amendment came with the Copyright Modernization Act of 2012. Developments since then will continue to demand new laws to clarify what is fair and ethical, what should be prohibited, and who owns the rights to what.

For example, suppose your supervisor asks you to use your Facebook page or Twitter account to give an occasional "plug" to your company's products. Are you obligated to comply? If you later change jobs, who owns your posts or tweets—are they yours, or does your now-former employer have a right to them? And what about your network of "friends"? Can your employer use their contact information to send marketing messages? These and many other questions remain to be answered as technology, industry practices, and legislation evolve (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 damages a reputation. If a false statement of fact that concerns and harms the person defamed is 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. You have a Charter right to express your opinion (section 2[b]), but the words you use and how you use them, including the context, are relevant to their interpretation as opinion versus fact. Always be careful to qualify what you write and to do no harm (Business Communication for Success, 2015).

Using Social Media Professionally

Review sites, blogs, tweets, and online community forums are some of the continually developing means of social media being harnessed by business and industry to reach customers and other stakeholders. People's comfort in the online environment forces businesses to market and interact there or risk a massive loss in sales and interest. Though most users learn how to use social media as an extension or facilitator of their social lives, using the same platforms for professional reasons requires some change in behaviour.

First, recognize that every modern business or organization should have a social media presence in the sites they expect their customer base to frequent, especially popular sites such as Twitter, Facebook, and Instagram. Messaging here must be consistent across the platforms when alerting the customer base of important information such as special events, deals, and other news.

Next, follow expert advice on how to properly take advantage of social media in detail to promote your operation and reach people. Large companies will dedicate personnel to run their social media presence, but small businesses can do much of it themselves if they follow some decent online advice such as the following:

- The Do's and Don'ts of How to Use Facebook for Business [Infographic] (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)

Know also that social media is a constantly evolving environment. Stay on trend by continually searching out and implementing the latest advice similar to the above.

Finally, always consider how the sites you access and what you post represent you and your employer, even if you think others don't know where you work or who you are. Internet service providers (ISPs) are required by law to archive information concerning the use and traffic of information that can become available under subpoena. Any move you make leaves digital footprints, so you will have to answer for any misstep that brings shame upon you or your company (*Business Communication for Success*, 2015).

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.

Exercise

1. Identify ways that you can professionalize your online presence using social media.

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Unit 19: Texting and Instant Messaging

Learning Objective

1. Use rapid electronic communication channels such as texting and instant messaging in a professional manner.

Whatever digital device you use, written communication in the form of Short Message Service (SMS), or texting, has been a convenient and popular way to connect since the 1990s. Instant messaging (IMing) apps like Snapchat, WhatsApp, and Facebook Messenger have increased the options people have to send and respond to brief written messages in real time when talking on the phone would otherwise be inconvenient. In business, texting and IMing are especially advantageous for hashing out details precisely in writing so that they can be referred to later. Texting and IMing are not useful for long or complicated messages but are great for connecting while on the go. However, consider your audience and company by choosing words, terms, or abbreviations that will deliver your message most effectively using these communication tools.

Tips for Effective Business Texting:

- Know your recipient; "? % dsct" may be an understandable way to ask a close associate what the proper discount is to offer a certain customer, but if you are texting or IMing your boss, it might be wiser to write, "what % discount does Murray get on $1K order?"
- Anticipate unintentional misinterpretation. Texting often uses symbols and codes to represent thoughts, ideas, and emotions. Given the complexity of communication, and the useful but limited tool of texting, be aware of its limitation and prevent misinterpretation with brief and clear messages.
- Contacting someone too frequently can border on harassment. Texting is a tool. Use it when appropriate but don't abuse it.
- Unplug yourself once in awhile. 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)](#).

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.

Exercise

1. Identify ways that you must change your texting and IM behaviour in professional—rather than purely social—contexts.

PART VII TRADITIONAL WRITTEN COMMUNICATION

This part will focus on traditional written communication channels that are still vital to the functioning of modern businesses. Despite origins as handwritten and typed hard-copy documents; letters, memos and reports continue to prove their worth both in the form of printed hard copies and electronic documents. Every professional should familiarize themselves with the conventions associated with each type of document so that they can use them to achieve their particular purposes.

In this part, we will cover:

- Letters
- Memos
- Reports

Unit 20: Letters

Learning Objectives

1. Learn the purposes of letters.
2. Identify the parts of effective letters.

As one of the most formal documents you can send, a letter conveys a high degree of respect to its recipient. Sending a letter is your way of saying that the recipient matters. Letters are usually one to two page documents sent to people or organizations outside of the organization from which they're sent, whereas memos are equivalent documents for communications within an organization. Though we use email for many of the occasions that we used to send letters for before the twenty-first century, letters are still sent rather than emails for several purposes:

- Cover letters to employers in job applications
- Thank-you letters and other goodwill expressions
- Letters of resignation
- Letters of recommendation and Reference letters
- Letters of transmittal to introduce reports or proposals
- Campaign initiatives, such as for fundraising or political advocacy
- Official announcements of products, services, and promotions to customers
- Claims and other complaints sent to companies to lay down a formal paper-trail record as evidence in case matters escalate into the court system
- Collection notices to people with overdue payments

In these cases, letters offer the advantage of formality, confidentiality and a record of evidence.

There are two main types of letters: block-style letters and modified-block style. The block style used by organizations has a company letterhead at the top, whereas modified-block letters are typically written independently by individuals. Though you may see minor format variations from company to company, letters have 10-12 major parts, each of which we'll examine for the conventions that, if followed, show that you are able to write to a high standard of formality should the occasion call for it.

Letter Parts

- Return Address or Company Letterhead
- Date Line
- Recipient Address
- Subject Reference
- Opening Salutation

- Message Opening
- Message Body
- Message Closing
- Closing Salutation
- Signature
- Signature Block
- Enclosure Notice

Before delving into this detail, however, let's review the advantages, disadvantages, and occasions for using letters given earlier in unit 6 on channel selection.

Table 20.1 Excerpt: Letter Pros, Cons, and Proper Use

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Letter	• Shows respect through formality and effort • Ensures confidentiality when sealed in an envelope and delivered to the recipient's physical address (it is illegal to open someone else's mail) • Can introduce other physical documents (enclosures)	• Slow to arrive at the recipient's address depending on how far away they are from the sender • Can be intercepted or tampered with in transit (albeit illegally) • Can be overlooked as junk mail • Time consuming to print, sign, seal, and send for delivery • Mail postage is costlier than email	• Follow conventions for different types of letters (e.g., block for company letters, modified block for personal letters) and provide the sender's and recipient's address, date, recipient salutation, closing salutation, and author's signature • Use company letterhead template when writing on behalf of your organization	• For providing a formal, permanent, confidential written message to a single important person or organization • Ideal for job applications (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

Return Address or Company Letterhead

The first piece of information in a letter is usually the sender's address. In block-style letters, the address appears as part of the company letterhead in the header under or beside the prominently displayed and brand-stylized company name and logo. Use a company letterhead template whenever writing on behalf of the company you work for; never use it for personal messages (e.g., reference letters for a relative) not authorized by the company. The company letterhead address usually appears in the one-line style following the format given below:

[Street number] [Street name] [Street type], [City or town], [Provincial abbreviation] [two spaces] [Postal code with a single space in the middle]

Example: 1385 Woodroffe Avenue, Ottawa, ON K2G 1V8

The letterhead also includes other contact information such as phone and fax numbers, as well as the company web address. Some company letterhead templates move some or all of these parts, besides the company name and logo, to the footer so that the whole page is framed with company branding. For dozens of letter template examples, go to open a blank new document in MS Word and type "letter" into the document type or go to Letters (Microsoft Office, 2014).

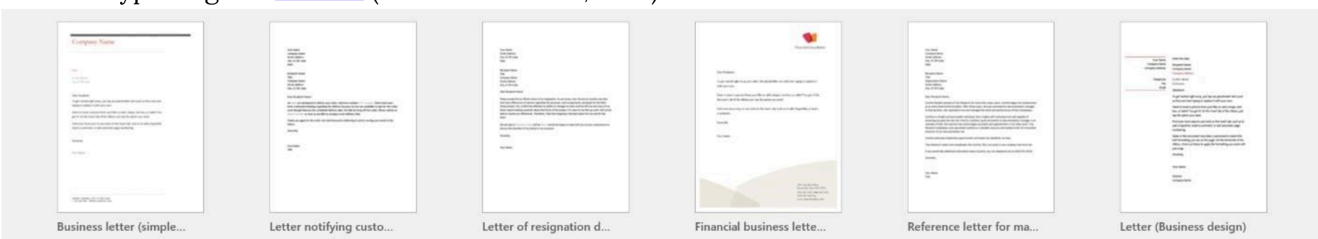

Figure 20.1: Selection of Microsoft Word business letter templates

Because **modified-block-style letters** are sent by individuals unaffiliated with a company, they typically include only the sender's two-line address at the top, which divides the above address style in half so that the street number, name, and type go on the first line (with no comma at the end), and the city/town, provincial abbreviation, and postal code go on the second, as shown below:

Example:

1385 Woodroffe Avenue
Ottawa, ON   K2G 1V8

In both styles of address, strike a formal tone by fully spelling out the street type rather than abbreviating it (e.g., *Street*, not *St.*; *Avenue*, not *Ave.*; *Road*, not *Rd.*; *Crescent*, not *Cres.*; *Boulevard*, not *Blvd.*; *Court*, not *Crt.*; etc.). Using the abbreviations is fine in informal, personal letters, however.

A distinguishing feature of the modified-block style is that the sender address is justified (flush) to the vertical middle of the page (i.e., the left edge of its text lines up with it) rather than the left margin. Do this by highlighting the two address lines, then clicking and dragging the base of the left-margin tab in your word processor's ruler right to the vertical midpoint of the page. If your page has 2.5 cm margins, that would be at around the 8.25 cm mark. Note that modified-block-style letters place the sender's address on the first line below the header (i.e., about an inch or 2.5 cm from the top edge of the page) and don't include the sender's name at the top of this address block. The reader can find the sender's name by darting their eyes down to the signature block at the bottom.

In some circumstances, you may want to use block-style letters with a letterhead when writing on your own behalf rather than for a company. When writing a cover letter, for instance, you can stylize your name prominently as if it were the name of a company so that it stands out in a larger font in bold typeface, possibly in an eye-catching colour. Because this appears in the header margin, adopting the block style has the additional advantage of placing your name and contact information automatically on every page so that consistent personal branding extends to the one- to two-page résumé that follows, including the references page that would be separated out for confidentiality reasons.

[Return to the Letter Parts menu]

Date Line

In a formal letter, the date must follow the unambiguous style that fully spells out the month, gives the calendar date, a comma, and the full year (e.g., April 25, 2020). In block-style letters, this appears left-justified (its left edge lines up with the left margin) often with 2-3 lines of space between it and the company letterhead above it and, for symmetry, as much between it and the recipient address below.

In modified-block-style letters, however, the date often appears as the third line of the sender address block. Its left edge therefore lines up with the vertical middle of the page. Only one line of space should separate the date line from the recipient address below. After this, block-style and modified-block letters are formatted in the same way until you get to the signature block at the bottom.

[Return to the Letter Parts menu]

Recipient Address (receiver's block)

No matter what style of letter you use, the recipient address is left-justified, begins with the recipient's full name on the top line, and follows with their mailing address on the lines below in the format options given in Table 20.2 below.

Table 20.2: Standard Letter Address Format for Company and Personal Recipients

Address Format	**Examples**
Title Full Name, Professional Role Company Name # Street Type Town/City, PA A1B 2C3	Dr. Michelle Masterton, Geriatrician Tidal Healthcare Clinic 6519 Maynard Street Halifax, NS B4L 6C9
Title Full Name, Credentials Professional Role (if long) # Street Type Town/City, PA A1B 2C3	Mr. Jonathan Carruthers, MBA Freelance Marketing Consultant 3489 Cook Street Victoria, BC V9G 4B2

Notice that commas follow only (1) the recipient's name if followed by a professional role (capitalized) or credentials abbreviation and (2) the city or town. Two spaces separate the provincial abbreviation (PA) from the postal code, which has a single space in the middle dividing the six alpha-numeric characters into two groups of three for readability. Though you sometimes see addresses that fully spell out the province, rather than abbreviate it, and have only one space between the province and postal code, the style given above is dominant and has the advantage of being more concise and clearly distinguishing the province from the postal code without crowding the line with commas. Keep the end of each line free of any punctuation.

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Subject Reference

Like a subject line in an email, letters can have subject lines that indicate the topic or purpose. The same titling principles as email apply (see unit 17), only the letter's subject reference begins with "**Re:**" or "RE:" or "Subject:" and is entirely in either bold typeface or all-caps, but not both. You might also see it positioned above or below the opening salutation, but usually above. Like all the text blocks besides the date line, a blank line of space separates this from the other parts above and below.

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Opening Salutation

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

Table 20.3: Opening Salutation

Opening Salutation Form	**Examples**
Dear [Title] [Full or Last Name]:	Dear Ms. Françoise Hardy: Dear Mr. Serge Gainsbourg: Dear Mrs. Pattie Boyd: Dear Dr. Landy: Dear Ms. Vartan: Dear Dana Dortmund:

The Dear, title, full name, and colon all signal formality. Variations in formal letters include omitting the title or the first name, but not both at once. Omit the title if you're at all concerned about its accuracy. For instance, if the recipient's first name is a unisex name and you're not sure if they're male or female, skip the gender title to avoid offending the recipient by mixing up their gender. Unless you're sure that the recipient prefers *Mrs.* (indicating that she's married) over *Ms.* because she's used it herself, *Ms.* might be the safer option. Avoid the title *Miss* because it's no longer commonly used and appears outdated. If you're addressing someone who identifies as non-binary, then *Mx.* might be best if you must use a title, or just no title at all. Other considerations in the opening salutation include the following:

- Using the recipient's first name only is appropriate only if you know them well on a friendly, first-name basis.

- Using a comma instead of a colon is appropriate only for very informal letters.
- *To whom it may concern*: is an appropriate opening salutation only if you really intend for the letter to be read by whomever it is given to, as in the case of a reference letter that an applicant gives copies of to potential employers. Otherwise, every effort should be made to direct the letter to a particular person, especially cover letters. If an employer has deliberately omitted any mention of who is responsible for hiring an applied-for position, addressing the person by professional role (e.g., *Dear Hiring Manager*:) is acceptable.

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Message Opening

Letters are ideal for both direct- and indirect-approach messages depending on the occasion for writing them. Consistent with what we saw in unit 11 , direct-approach letters get right to the point by stating their main point or request in a paragraph of no more than a sentence or two. Letters organized with openings like this lend themselves to positive or neutral messages. Ideal for formally delivering bad-news or persuasive messages, indirect-approach letters begin with a buffer paragraph—again, this may only be a sentence or two—just to say some nice things before getting to the bad news or difficult request in the body of the message. (See unit 11 for more on the indirect approach).

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Message Body

Whether the opening takes the direct or indirect approach, the body supports this with explanatory detail (see §unit 11 on message bodies). Ensure that your message body abides by the 6 Cs of (see unit 13), especially conciseness because a letter should only be a page or two. If appropriate for the content, use effective document design features such as numbered or bulleted lists to improve readability (see unit 14). For instance, if your letter contains a series of questions, use a numbered list so that the reader can respond to each with a corresponding numbered list of their own.

Message body paragraphs should be proper three-part paragraphs. Like all other text blocks throughout (except for the return address above and signature block below in a modified-block letter), every line in the message body must be flush to the left margin, including the first. In other words, rather than indent a paragraph's first line as novels do to mark where one paragraph ends and another begins, separate them with a blank line. Brevity in formal letters limits the number of paragraphs to what you can fit in a page or two.

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Message Closing

The closing mirrors the opening with a sentence or two that wraps up the letter with something relevant to the topic at hand (see unit 11 on message closings). Because of their formality, letters almost always end with a goodwill statement, such as an expression of gratitude thanking the reader for their attention or consideration. For instance, a cover letter thanks the reader for their consideration, invites them to read the enclosed résumé, and expresses interest in meeting to discuss the applicant's fit with the company in person since getting an interview is the entire point of an application. A thank-you letter will thank the recipient again, and a recommendation letter will emphatically endorse the applicant. Even letters delivering bad news or addressing contentious situations should end with pleasantries rather than hostile or passive-aggressive jabs. If an action is required, be sure to indicate when you would expect follow through.

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Closing Salutation

A simple *Sincerely* or *Cordially* are standard business letter closing salutations that signal the formal end of the message much like the opening salutation did before the beginning of the message proper. A more personal letter sent to someone you know well may end with *Yours truly* (with the second word all lowercase), but don't use this with someone you've never met or with anyone you want to maintain a strictly professional relationship with. Always place a "hanging comma" at the end of the line, as you can see in Table 20.4 below.

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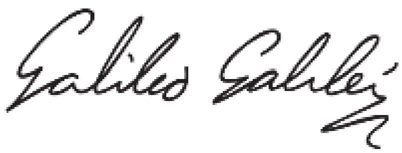
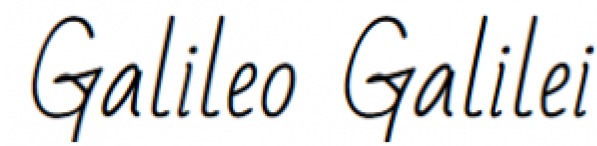
Signature

Your signature is a guarantee of authorship that carries legal weight. In a printed letter, leave enough space—usually about three single-spaced lines—to autograph your signature by hand. When sending a letter that you write and submit completely electronically, you have two options for an electronic signature, as explained in Table 20.4 below. Of the two, an image of your hand-written signature looks much more professional than a typed-out version using a simulated handwriting font. The hand-written image gives the impression that you are adept at technology.

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

Signature Image	Simulated Signature
Sincerely,  Galileo Galilei, Astronomer Image source: [Connormah](#) (2009)	Sincerely,  Galileo Galilei, Astronomer
1. Write your signature several times on a piece of blank, white paper. 2. Scan the document. 3. Crop the best image into a close-fitting jpeg image file. If the scanner makes a PDF file of the scanned image, make a jpeg file of the best signature by using the Snipping Tool (Microsoft Support, 2017) with the file type set to jpeg and saving the captured image. 4. Drag and drop the signature image from the folder where you saved it to the space between your closing salutation and your full printed name in the signature block. 5. Adjust the signature size so that it occupies the equivalent of about 2-3 single-spaced lines and delete any blanks lines of space above and below it so that it fits snugly between the closing salutation and your full printed name.	1. Type your name on the line between your closing salutation and full printed name in the signature block. 2. Highlight it. 3. Go to the font selection dropdown menu and select a simulated handwriting signature that is common to most computers such as Freestyle Script. 4. Adjust the font size so that your simulated signature occupies the equivalent of 2-3 single-spaced lines.

Don't cut corners when assembling an image of your handwritten signature. For instance, taking a smartphone photo of your signature rather than scanning it will look amateurish because the background will probably be greyish or another off-white shade that will clash with the pure white of your page background. Also, drawing your signature with your computer's mouse or touchpad will look shaky like it was signed by a seven year-old. The inserted signature image must be seamlessly integrated and smoothly drawn for it to look professionally done.

Besides giving the impression that you're adept at technology, making an image file of your handwritten signature for electronic letters also sets you up for using it repeatedly to sign contracts and other documents electronically. If current labour trends take us to a predominant gig economy (Nazareth, 2017), having a shortcut for signing emailed contracts will save you time. Unless you're sent a contract via DocuSign or an equivalent technology solution to legally sign documents in a secure manner, a PDF contract sent to you would otherwise require printing it out, signing it, scanning it, and emailing it back. With a signature image, you can just drag and drop your signature into the document after downloading it, re-save it as a PDF, and email it back to the employer in a minute or two.

Though the simulated signature is certainly easier to put together, it carries with it several problems: it looks lazy and even tacky, carries no legal authority, and may not appear as a simulated signature font when it's opened by the recipient on another computer. If it's opened on, say, a Mac computer when you wrote it on a Windows-based PC, the signature might be converted into 25-pt. Arial font, making the recipient wonder why you chose a font that looks nothing like handwriting for your signature. The reason is that their computer didn't have the signature font you chose, or something was lost in translation, and their reader rendered the signature into a different font. For these reasons, using an image of your actual signature is better.

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Signature Block

The signature block clarifies the sender's name in full since handwritten signatures are rarely legible enough to do so themselves. The sender's professional role follows their name either on the same line (with a comma in between) if both the name and role are short enough, and on the second line if they are too long together. On the line below the sender's name and role can appear the name of the company they work for and their work email address on the third line; all three lines are single-spaced. If you are writing independently, putting your email address and phone number on the line(s) after your printed name depends on if you used a simple modified-block style address at the top, in which case you should add your contact info in the signature block. If you used a personal letterhead, perhaps for a job application cover letter, then you need not include anything more than your full printed name in your signature block.

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

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Enclosure Notice

Just as emails can include attachments, letters are often sent along with other documents. Cover letters introduce résumés, for instance, and letters of transmittal introduce reports to their intended recipients. In such cases, an enclosure notice on the very last line of the page (above the footer margin) tells the reader that another document or other documents are included with the letter. This would look like the following:

Enclosures (2): Résumé, Portfolio

For other documents included with the letter, simple, brief titles such as *Brochure* or *Thank-you Card* would suffice. Separate each with a comma if you have more than one.

Return to the Letter Parts menu

Before Sending Your Letter

Given the importance of the letter you're writing, especially if it has to do with employment, editing is crucial to your career success. Even a single writing error in a cover letter, for instance, is enough to prompt the reader to dump it in the shredder without even glancing at the enclosed résumé, making the applicant's efforts useless. Revise and proofread as per guidelines in Part V on editing.

Ensure also that your letter meets all expectations for standard business letter format. In North America, the page must be 8.5″ x 11″ (21.6 x 27.9 cm) with one-inch (2.5 cm) or 3 cm margins all around. Though letterhead and graphic elements may go in the header and footer for company branding purposes, the side margins must remain blank. Make the font 12-point Arial or a similar sans-serif font that is AODA compliant. Single-space the text by ensuring that the line spacing is 1.0 in your word processor, which may be different from your word processor's default (the MS Word default is 1.08). Adjusting the default setting that adds additional line spaces every time you hit the Enter or Return key is essential to avoiding the effect of the line spacing looking like it's double even when you indeed set it to single.

Though letters sent electronically can be attached in emails or uploaded to a website, hard-copy letters must be printed out and signed. Those mailed on their own or perhaps with one or two enclosed pages can be folded twice to make three horizontal panels of equal height so that the letter fits in a standard 4 1/8″ x 9 1/2″ envelope. When a hard-copy letter covers extremely important documents (e.g., a mailed job application or report), consider sending them pristinely unfolded in a 9″ x 11.5″ envelope.

Finally, ensure that you leave enough time for your letter to arrive at its destination if punctuality is a factor. Though letters sent to a destination within your city may take only a couple of days to get there, those sent across the country may take a week or longer depending on weekend and holiday slow-downs (e.g., letters sent during the Christmas holiday season take longer to arrive). Email has largely replaced hard-copy letters because it ensures that a message gets to its destination the instant you press *Send*, so send letters when urgency isn't an issue.

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

- How to Format a Business Letter (Doyle, 2018)
- Writing the Basic Business Letter (Purdue OWL, n.d.)
- How to Write a Business Letter (wikiHow, 2018)

Key Takeaway

If you need to send a highly formal message to show respect to your recipient and ensure confidentiality, follow standard business letter conventions.

Exercise

1. Review the “cover letter” sample posted on blackboard.

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Unit 21: Memos

Learning Objective

1. Identify the parts of effective traditional documents such as memos.

A memo communicates policies, procedures, short reports, or related official business within an organization. It assumes a one to all perspective, broadcasting a message to a group audience, rather than to individuals such as what email or letters often do. Memos are objective in tone and avoid all personal bias or subjective preference, especially because they may have legal standing when reflecting policies or procedures. Accuracy is therefore paramount in memos.

Before exploring memos in more detail, let's review the advantages, disadvantages, and occasions for using memos given earlier in Table 21.1 on channel selection.

Table 21.1 Excerpt: Memo Pros, Cons, and Proper Use

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Memo	• Provides a written record of group decisions, announcements, policies, and procedures within an organization • Can also be a format for delivering short 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 emailed	• Requires a good archiving system to make memos easily accessible for those (especially new employees) needing to review a record of company policies, procedures, etc.	• Use template with company letterhead • Follow the same conventions as email, except omit the opening and closing salutations and e-signature	• For a written record for decisions, announcements, policies, procedures, and short reports shared within an organization • Post a printed version on an office bulletin board and email to all involved

Memo Purpose

A memo's purpose is often to inform, but it occasionally includes an element of persuasion or call to action. All organizations have informal and formal communication networks. The unofficial, informal communication network within an organization, the "grapevine," is often a channel for rumour, gossip, and innuendo. On the grapevine, one person may hear that someone else is going to be laid off and start passing the news around. Rumours often distort the truth more and more the further along they are passed. Before you know it, the word is that the company is shutting down your entire department.

One effective way to address informal, unofficial speculation is to spell out clearly for all employees what is going on with a particular issue. If budget cuts are a concern, then it may be wise to send a memo explaining the imminent changes. If a company wants employees to take action, they may also issue a memorandum. For example, a company memo may announce a new program incentivizing employees to use public transit or other alternatives to driving to work and filling up the parking lot with their single-occupant vehicles. In this way, memos often represent the business or organization's interests. They may also include statements that align business and employee interest, and underscore common ground and benefit (Business Communication for Success, 2015).

Return to the Memo Topics menu

Memo Format

A memo often has a letterhead with "MEMO" and the company name and logo at the top of the page. Below this are the header fields identifying the recipient, author, date, and subject much like you would see in an email. In fact, email's header fields are based on those traditionally found in memos, so the same principles for what to include here, such as how to title the document in the subject line, are true of emails (see unit 17).

Unlike emails, memos omit the opening salutation but, from there, are similar in their three-part message organization with an opening, body, and closing. Always direct-approach, the memo message opening states the main point, the body supports this with details, and the closing gives action information or a summary.

For more on memos, see the following resources:

- *Purdue OWL's four Memos modules, starting with Audience and Purpose* (*Perkins & Brizee*, 2018)
- How to Write a Memo (wikiHow, 2018)

Key Takeaway

Memos are used within an office for providing information on policies, procedures, and short reports.

Exercise

1. Review the sample memo posted on blackboard.

References

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Unit 22: Reports

Learning Objectives

1. Understand the purpose of reports and report organization.
2. Identify different types of reports.
3. Identify the parts and contents of reports.

A vital part of any business or organization, reports document specific information for specific audiences, goals, or functions. The type of report is often identified by its primary purpose or function, as in an accident report, a laboratory report, a sales report, or even a book report.

Reports are often analytical but sometimes just "report the facts" with no analysis at all. Other reports summarize past events, present current data, and forecast future trends. While a report may have conclusions, propositions, or even calls to action, presenting analysis is the primary function. A sales report, for example, is not designed to make an individual sale. It is, however, supposed to report sales to date and may forecast future sales based on previous trends *(Business Communication for Success, 2015)*.

Table 22.1 Excerpt: Report Pros, Cons, and Proper Use

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Report	• Allows presentation of a high volume of information presenting research and analysis • Can take various forms such as a document booklet or proposal for reading alone	• Time-consuming to write with proper research documentation and visual content • Time-consuming for the busy professional to read or an audience to take in	• Follow conventions for organizing information according to the size of the report, audience, and purpose • Visual aids should be covered in the text	• For providing thorough business intelligence on topics important to an organization's operation • For internal or external audiences • For persuading audiences with well-developed arguments (e.g., recommendation reports)

INFORMATIONAL AND ANALYTICAL REPORTS

Reports come in all shapes and sizes—from a couple of soft-copy pages shared electronically to a book-sized binder. The type of report depends on its function as expressed in the purpose statement. The function also influences the writing style and other elements such as visual content (figures) and presentation of numerical values. Reports also vary by style and tradition. Regardless of their specific function or type, however, there are two main categories of reports: informational and analytical.

Informational reports provide facts, data, feedback, and other types of information to assist management to make decisions. Informational reports do not provide an analysis or interpretation of information and do not provide recommendations. An example of this type of "just the facts" report is a police accident report. The report will note the time, date, place, contributing factors like weather, and identification information for the drivers involved in an automobile accident. It does not establish fault or include judgmental statements. You should not see "Driver was falling down drunk" in a police accident report. Instead, you would see "Driver failed sobriety tests and breathalyzer test and was transported to the station for a blood sample." The police officer is not a trained medical doctor licensed to make definitive diagnoses, but can collect and present relevant information that may contribute to a diagnosis.

Analytical reports provides facts, data, feedback and other types of information, but they also provide analysis, interpretation, and recommendations. For instance, a field report by a Public Health Agency of Canada physician from the site of an outbreak of the H1N1 virus will note symptoms, disease progression, and steps taken to arrest the spread of the disease. It will ultimately make recommendations on the treatment and quarantine of subjects. Figure 22.1 below includes common reports that, depending on the audience needs, may be informational or analytical [(Business Communication for Success, 2015](); Business Communication Essentials, 2016)

Report Characteristics

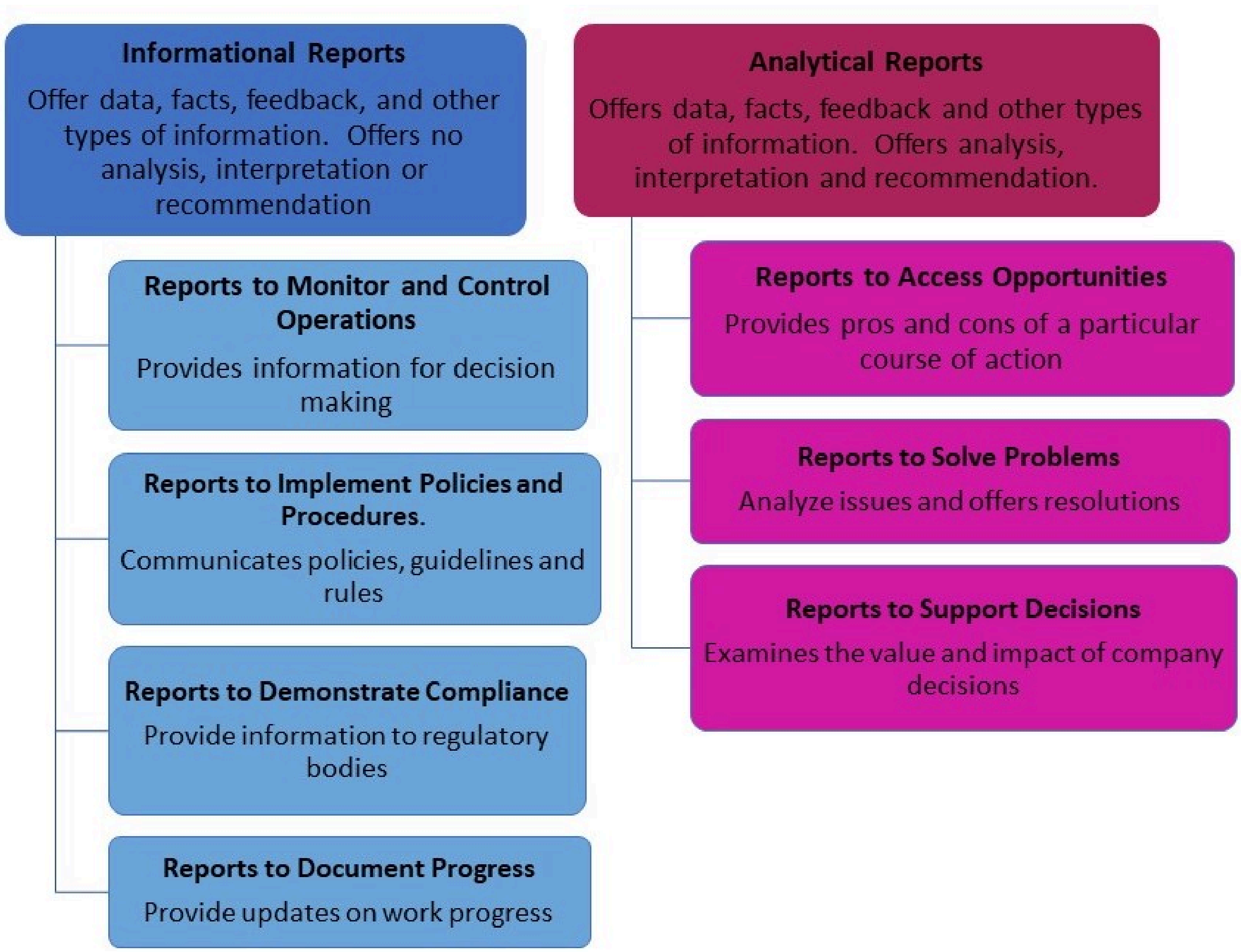
Informational	Analytical
Characteristics ✓ Provides facts, data, feedback and other types of information ✗ Does not analyze or interpret information ✗ Does not provide recommendations	Characteristics ✓ Provides facts, data, feedback and other types of information ✓ Does analyze and interpret information ✓ Does provide recommendations

Figure 22.1 notes important similarities and differences between informational and analytical reports.

Analytical and Information Report Purpose

Each report purpose is best suited for specific types of report. Figure 22.2 below provides an overview of the most appropriate business situations to use an informational or analytical report.

Figure 22.2 Informational and Analytical Reports



REPORT ORGANIZATION

Because reports vary by size, format, and function, writing them involves adjusting to the needs of the audience while respecting conventions and guidelines. Reports are typically organized around six key elements, the 5Ws + H:

1. Whom the report is about and/or prepared for
2. What was done, what problems were addressed, and the results, including conclusions and/or recommendations
3. Where the subject studied occurred
4. When the subject studied occurred
5. Why the report was written (function), including under what authority, for what reason, or by whose request
6. How the subject operated, functioned, or was used

Pay attention to these essential elements when you consider your stakeholders, or those who have an interest in the report. That may include the person(s) the report is about, whom it is for, and the larger audience of the business, organization, or industry. Ask yourself who are the key decision makers reading the report, who the experts or technicians will be, and how executives and workers may interpret your words and images. [(*Business Communication for Success*, 2015)]

Direct vs Indirect Organization Pattern

The audience, purpose and content of a report will influence the report's organizing pattern: direct or indirect.

Direct Pattern: Direct reports contain routine, nonsensitive information. Reports using this organizing pattern will present the most important findings first followed by facts, data and other explanatory details. Thus, the direct approach is most appropriate for **informational reports**. In addition, when the receiver is likely to be in agreement with and accepting of the report's information and recommendations, the direct approach can also be applied to **analytical reports.** This approach allows the receiver to access relevant information in a quick, efficient and easy to follow manner.

The Direct Approach

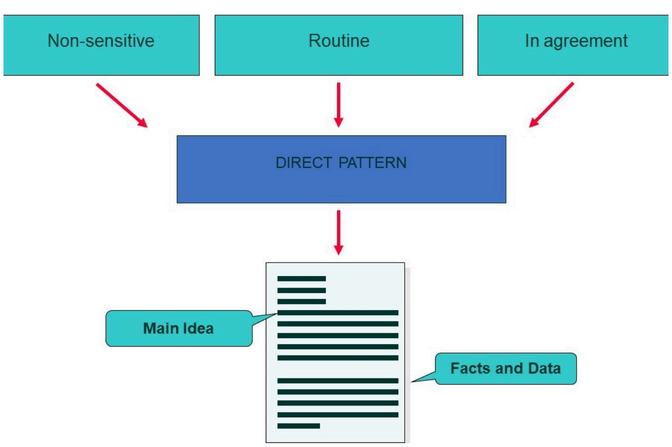


Figure 22.3 presents organizing pattern of a direct report.

Indirect Pattern: An indirect approach may contain sensitive, controversial, debated or unpleasant information. As a consequence, not all readers will be knowledgeable of, in agreement with, or accepting of the information and/or recommendations made in the report. For this reason, the indirect approach is used when the audience must be educated about or persuaded of the credibility of the information presented and merits of the recommendations made. An indirect report presents the facts, data and other explanatory details before presenting its conclusions and recommendations. Since only analytical reports present recommendations, the indirect approach is used exclusively with **analytical reports**. ([Business Communication Essentials, 2016](); [Communicating for Results, 2017)]()

The Indirect Approach

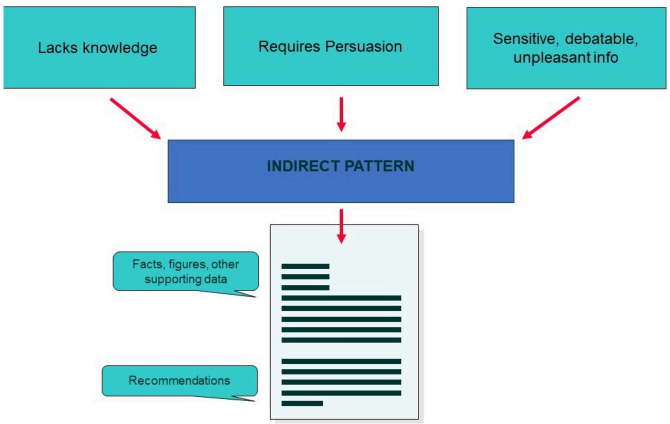


Figure 22.4 shows the organizing pattern of a indirect report.

Information Organization Methods

Time	Component	Importance	Criteria	Convention
Time organization is used to provide information in the order of events (e.g. what happened first, second, etc.). Using time to write trip reports and progress reports is particularly effective.	A component organizing system is used primarily for informational reports. Here elements such as location, geography, division, product or parts is used to present the data.	Reports organized according to importance my present the most important information first and then proceed to the least important information—or visa versa.	Reports organized via criteria establish standards or benchmarks to assess different options, plans, strategies, and products.	Reports created using a prescribed template are said to be organized using convention. Many short information reports use convention as their organizing principle.

Figure 22.5 presents five ways to organize information to assist reader comprehension.

REPORT TYPES AND FUNCTION: INFORMAL REPORTS

Depending on the complexity and depth of content, reports are categorized as either informal or formal. Whatever the type, all reports provide the information that people in an organization need to solve problems and make plans.

Informal Reports:

The informal report is 10 pages or under, and for this reason, informal reports are also referred to as short reports. Informal reports can have both an internal and external audience, but are mostly written for an internal audience. For internal audiences, the informal report is constructed as a memo or email report; for the external audience, the informal report is constructed as a letter or email report.

The informal report is the most routine of all reports and the type you will have to write most often

In addition, the informal report can be informational or analytical in nature. The informational report contains non-sensitive, routine information, often presented in a prescribed format such as a fill-in-the-blank form. For this reason, the sections of an informational report include the introduction, findings, and conclusion. In contrast, the short analytical report seeks to answer questions about specific problems with the aim of solving those problems. How can we use social media more effectively? Should we close or open a new plant? How can customer service be improved? Therefore, the short analytical report not only includes an introduction, findings, and conclusion, but also recommendations.

Table 22.2 Informational and Analytical Report Sections

Informational Reports	**Analytical Reports**
• Introduction • Findings • Conclusion	• Introduction • Findings • Conclusion • Recommendation

The order of the sections in an analytical report will depend on if you are writing a **direct** or **indirect** report

Labels and Section Headers: Although the informal report is short, any document that is two pages or longer should include a feature that helps to separate information into unique sections. Utilizing headers for any report in excess of 2-pages creates a better organized report and assist readers to understand, locate, and retain information (Business Communication: Process and Product, 2016; Communicating for Results, 2017; Successful Business Communication, 2016).

Headers and Information Organization

A QUICK COMPARISON: USING HEADINGS?

Take a look at these two dummy texts to compare the structure of an informal report without headings and an informal report that uses headings. (Note that these examples only show the formatting of a report, not the ideal way to write one.)

No Headings	Using Headings
General Store is opening a new location in Q4 of this upcoming year. There are three potential locations for this new store. In my research, I found that location one is in a poorly trafficked area, but is more affordable. Location two is in a highly trafficked area, but is out of the current budget. Location three is just right. After this research, I can conclude that General Store should open its new store at location three.	**Background** General Store is opening a new location in Q4 of this upcoming year. There are three potential locations for this new store. **Findings** Location one is in a poorly trafficked area, but is more affordable. Location two is in a highly trafficked area, but is out of the current budget. Location three is just right. **Recommendation** General Store should open its new store at location three.

The following is a 14-point checklist for helping to ensure that a report fulfills its goals:

☐ 1. Report considers the audience's needs
☐ 2. Format follows function of report
☐ 3. Format reflects institutional conventions and expectations
☐ 4. Information is accurate, complete, and documented
☐ 5. Information is easy to read
☐ 6. Terms are clearly defined
☐ 7. Figures, tables, and graphic elements support written content
☐ 8. Figures, tables, and graphic elements are clear and correctly labeled
☐ 9. Figures, tables, and graphic elements are easily understood without text support
☐ 10. Words are easy to read (font, arrangement, organization)
☐ 11. Results are clear and concise
☐ 12. Recommendations are reasonable and well-supported
☐ 13. Report represents your best effort
☐ 14. Report speaks for itself without your clarification or explanation

(Business Communication for Success, 2015, 9.4)

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PART VIII ROUTINE MESSAGES

The vast majority of the couple hundred billion business emails sent every day are short messages of a routine nature such as asking for and sharing information, requesting action, or thanking someone for something given. Most of the time these are positive or neutral messages that are direct-approach messages where the main idea comes right upfront and details follow. Occasionally, you must communicate bad news in writing, which requires a more careful, indirect approach and then there are persuasive messages that are most effective if the AIDA approach is used.

Here are some examples of each type of message that a student might write:

Routine Messages

- Requesting that a Professor be a reference for a job opportunity
- Notifying a Professor that you will not be in class
- Asking a Professor for information about an assignment

Negative Message

- Letter of Resignation

Persuasive Message

- Cover Letter

Goodwill Message

- Thanking an employer after an interview

In this part, we will cover:

- Information Shares, Action Requests, and Replies
- Complaints and Claims
- Negative Messages
- Persuasive Messages
- Goodwill Messages and Recommendation letters

Unit 23: Information Shares, Action Requests, and Replies

Learning Objective

1. Write routine message types such as information shares, requests, and replies.

Ask any professional what kinds of messages they spend the majority of their time at a computer writing and responding to. They will likely tell you that they're requesting information or action and replying to those with answers or acknowledgements. Though you've probably written many of these yourself, you may need to polish your style and organization to meet a professional standard. After all, the quality of the responses you get or can give crucially depends on the quality of the questions you ask or are asked. Let's look at several such scenarios in detail.

Information Shares

Perhaps the simplest and most common routine message type is where the sender offers up information that helps the receiver. These may not be official memos, but they follow the same structure, as shown in Table 23.1 below.

Table 23.1: 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 Ministry 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

Notice here how the writer made the reader's job especially easy by providing links to the recommended webpages using the hyperlinking feature (*Ctrl.* + K) in their email.

Replies to such information shares involve either a quick and concise thank-you message or carry the conversation on if it's part of an ongoing project, initiative, or conversation. Recall that you should change the email subject line as the topic evolves (see unit 17). Information shares to a large group, such as a departmental memo to 60 employees, don't usually require acknowledgement and would be slightly more formal in tone. If everyone wrote the sender just to say thanks, the barrage of reply notifications would frustrate them as they try to carry on their work while sorting out replies with valuable information from mere acknowledgments. Only respond if you have valuable information to share with all the recipients or just the sender.

Information or Action Requests

Managers, clients, and coworkers alike send and receive requests for information and action all day. Because these provide the recipient with direction on what to do, the information that comes back or action that results from such requests can only be as good as the instructions given. Such messages must therefore be well organized and clear about expectations, opening directly with a clearly stated general request (see unit 11 on direct-approach messages)—unless you anticipate resistance to the request (see unit 11 on indirect-approach messages)—and proceeding with background and more detailed instruction if necessary as we see in Table 23.2 below.

Table 23.2: 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/Background	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: 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 72 dpi 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 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, because you're expecting action to come of the request rather than a Yes or No answer, the opening question doesn't require a question mark. Never forget, however, the importance of saying "please" when asking someone to do something (see unit 13 for more on courteous language). Notice also that lists in the message body help break up dense detail so that request messages are more reader-friendly (see unit 14). All of the efforts that the writer of the above message made to deliver a reader-friendly message will pay off when the recipient performs the requested procedure exactly according to these clearly worded expectations.

Instructional Messages

Effective organization and style are critical in requests for action that contain detailed instructions. Whether you're explaining how to operate equipment, apply for funding, renew a membership, or submit a payment, the recipient's success depends on the quality of the instruction. Vagueness and a lack of detail can result in confusion, mistakes, and requests for clarification. Too much detail can result in frustration, skimming, and possibly missing key information. Profiling the audience and gauging their level of knowledge is key (see unit 5 on analyzing your audience) to providing the appropriate level of detail for the desired results.

Look at any procedures document and you'll see that the quality of its readability depends on the instructions being organized in a numbered list of parallel imperative sentences. As opposed to the indicative sentences that have a grammatical subject and predicate (like most sentences you see here), imperative sentences drop the subject (the doer of the action, which is assumed to be the reader in the case of instructions). This omission leaves just the predicate, which means that the sentence starts with a verb. In Table 23.3 below, for instance, the reader can easily follow the directions by seeing each of the six main steps open with a simple verb describing a common computer operation: Copy, Open, Type, Paste (twice), and Find.

If you begin any imperative sentence with a prepositional (or other) phrase to establish some context for the action first (such as this imperative sentence does), move the adverb after the verb and the phrase to the end of the sentence. (If the previous sentence followed its own advice, it would look like this: Move the adverb after the verb and the phrase to the end of the imperative sentence if you begin it with a prepositional (or other) phrase to establish some context for the action first.) Finally, surround the list with a proper introduction and closing as shown in Table 24.3 below.

Table 23.3: Outline for Instructional Messages

Subject Line	Content	Example Email Message
Subject Line	Procedure name	How to find an undated webpage date
1. Opening	Reader benefits	Hi team, Would you like to learn a nifty little hack that can help you find information you need for properly crediting your sources? Please find below instructions for how to discover the date that a webpage was posted or last updated if it doesn't say so itself.
2. Context	Context for the procedure	Sometimes you need to know when exactly a webpage was posted or updated, but it either doesn't say or has a copyright notice at the bottom with the present year, and you know it was posted years ago, so that's not accurate. Rather than indicate "n.d." (for "no date") when citing and referencing a source in APA style, you can instead find out the actual date with a clever little trick.
3. Instructions	Introductory clause and numbered list, each with an imperative sentence (beginning with a verb)	To find the exact date that the webpage was posted or last updated, please follow the procedure below in your Google Chrome browser: 1. Copy the entire URL (web address) of the webpage you would like to find the date for by keying *Alt. + D* and *Ctrl. + C*. 2. Open up a new tab in the Google Chrome browser. 3. Type "inurl:" in the "Search Google or type URL" field in the middle of the page. 4. Paste (Ctrl. + V) the webpage URL immediately after "inurl:" (with no space between them), and hit the *Enter* (or *Return*) key; the web address will move up into the address bar and, after hitting *Enter*, you will see a list of search results, the top result of which should be the webpage you're looking for. 5. Paste &as_qdr=y15 at the very end of the search results page web address with no space between the URL and the above code, then hit the *Enter* key again. 6. Find the date in grey text on the third line of the first result of the new search results page, just below the title of the page in purple on the first line and URL in green on the second. 7. Adjust the controls (e.g., the date range so that it starts at a date earlier than 15 years ago) above if the results page says "Your search – [URL] – did not match any documents."
4. Closing	Specific action request, closing thought, summary, or deadline with a reason	If you encounter a webpage where this hack doesn't work at all, go with the year given in the copyright notice at the bottom or "n.d." in your citation and reference if it doesn't have a copyright year. Good luck, Nolan

Though helpful on its own, the above message would be much improved if it included illustrative screenshots at each step. Making a short video of the procedure, posting it to YouTube, and adding the link to the message would be even more effective.

Combining *DOs* and *DON'Ts* is an effective way to help your audience complete the instructed task without making common rookie mistakes. Always begin with the *DOs* after explaining the benefits or rewards of following a procedure, not with threats and heavy-handed Thou shalt nots. You can certainly follow up with helpful *DON'Ts* and consequences if necessary, but phrased in courteous language, such as "please remember to exercise caution in construction areas."

Indirect Information or Action Requests

If you expect resistance to your request because you're asking a lot of someone, perhaps because you know what you're asking goes against company policy, an indirect approach is more effective (see unit 11 on indirect message organization). Ideally, you'll make such persuasive pitches in person or on the phone so that you can use a full range of verbal and non-verbal cues (see unit 26 on persuasive messages). When it's important to have them in writing, however, such requests should be clear and easy to spot, but buffered by goodwill statements and reasonable justifications, as shown in Table 23.4 below.

Table 23.4: Outline for Indirect Information or Action Requests

Outline	**Content**	**Example Message**
Subject Line	Strategically vague	Furnace repair needed
		Hello Mike,
1. Opening	Buffer pleasantries	We've been nothing but impressed by the furnace and air conditioner installed by Redmond Heating & Air five years ago. We've recommended you to several friends because of your exceptional customer service.
2. Context	Background justification	A few days ago, however, our furnace suddenly stopped working. It's a bit of a mystery because we've been changing the filter regularly every month for the past five years and had you in here for regular check-ups every year, as per the terms of the warranty. When we checked the warranty, however, we saw that it expired a week ago. Talk about bad timing!
3. Main point	Information or action request, to which you will expect some resistance	Given that we've been such responsible and loyal customers, and that we've sent business your way a few times, we're wondering if we can still get you out here to repair the furnace under the terms of the warranty. Can we pretend that it's expiring next week instead of last week?
4. Closing	Deadlines and/or implementation details	I know this must be a busy time for you and we're asking a lot already, but since it's starting to drop below zero outside and probably won't take long to do the same inside here, could you please come as soon as possible. We'd be forever in your debt if you could help us out here! Many thanks, Belinda

Replies to Information or Action Requests

When responding to information or action requests, simply deliver the needed information or confirm that the action has been or will be completed unless you have good reasons for refusing (see unit 25 on negative messages). Stylistically, such responses should follow the 6 Cs of effective business style (see unit 13), especially courtesies such as prioritizing the “you” view (unit 13), audience benefits (unit 13), and saying “please” for follow-up action requests (unit 13). Such messages are opportunities to promote your company’s products and services. Ensure the accuracy of all details, however, because courts will consider them legally binding, even in an email, if disputes arise—as the Vancouver Canucks organization discovered in a battle with Canon (Smith, 2015). Manager approval may therefore be necessary before sending. Organizationally, a positive response to an information request delivers the main answer in the opening, proceeds to give more detail in the body if necessary, and ends politely with appreciation and goodwill statements, as shown in Table 23.5 below.

Table 23.5: 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	Greetings, Mr. Prendergast: Thank you so much for choosing the Vancouver Marriott for your spring 2020 sales conference. We would be pleased to accommodate 250 guests and set aside four conference rooms next May 25 through 29.
2. Body	Further details	In answer to your other questions: • Yes, all 250 of your guests can dine together in our Nootka Banquet Hall in a variety of table configurations to suit your needs. • Certainly, you can choose from among six conference rooms with 100-seat capacities, as well as a variety of other smaller rooms. Each has a large screen with a podium equipped with an audio-visual presentation console; presenters can either plug their USBs into the Windows-based console computer or connect their laptops with the HDMI cable. • Every guest suite has wifi and each of our hotel's 30 floors has a business lounge equipped with 10 computer work stations (5 PCs and 5 Macs), multifunctional phone/faxes, and printer/copiers. • Yes, we have a fleet of five shuttles that can transport 10 guests (plus luggage) at a time from the airport as flights arrive and back as they depart. You can visit our website at www.vancouvermarriott.com for additional information about our facilities such as gyms, a spa, and both indoor and outdoor swimming pools. Call us at 1-604-555-8400 if you have additional questions.
3. Closing	Deadlines and/or action details	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. Again, we are very grateful that you are considering the Vancouver Marriott for your conference. We look forward to making your stay memorable. Rufus Killarney, Booking Manager Vancouver Hilton

Return to the Information Shares, Action Requests, and Replies Topics menu

Key Takeaway

Follow best practices when sharing information, requesting information or action, and replying to such messages.

Reference

Smith, C. L. (2015, May 8). Canada: When does an email form a legally-binding agreement? Ask the Canucks. Retrieved from http://www.mondaq.com/canada/x/395584/Contract+Law/When+Does+An+Email+Form+A+LegallyBinding+Agreement+Ask+The+Canucks

Unit 24: Complaints and Claims

Learning Objective

1. Write routine message types such as complaints and claims.

Business doesn't always go smoothly. Customers can be disappointed with a faulty product or poor service; shipments might get damaged on route, lost, or arrive late; or one business might infringe on the rights and freedoms of another. In all such cases, the offended party's responsibility is to make the offending party aware of what went wrong and what they want done about it. Indeed, it's their consumer right to do so and the business or organization receiving such a message should take it as valuable intelligence on customer expectations that must be met for the operation to be viable.

A **claim** explains what went wrong and demands compensation from the offending party, whereas a **complaint** explains what went wrong and merely demands correction or apology. Minor complaints are best communicated in person, on the phone, or by email (if it's important to have them in writing) so they can be dealt with quickly. More serious complaints or claims are delivered as formal letters to lay down a paper trail in case they need to be used as evidence in a lawsuit.

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 abused CSR had nothing to do with the complaint.

Ineffective complaints or claims often merely vent frustrations, issue threats, don't say what they want or only vaguely imply it, or demand completely unreasonable compensation. Demanding a lifetime supply of milk from your grocery store because one carton happened to be rotten will result in nothing because the manager or CSR will dismiss it altogether as being ridiculous opportunism. Threatening to shop elsewhere makes you sound like a lost cause and therefore not worth losing any more time or money on. Since such messages are usually aggressive (or passive-aggressive) in tone and therefore rude and offensive, the recipient may respond aggressively in turn, give the complainant much less than what they asked for (e.g., a mere apology rather than compensation or replacement), or ignore the complaint altogether. Often the 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's done right because, no matter the industry, companies are rightly afraid of losing business to negative online reviews. According to one study, even one negative review can cost a business 22% of customers and three negative reviews 59% (Arevalo, 2017). One mother's endorsement or warning to others about a local store in a local moms group on Facebook could make or break that business. Even worse, complaints aired on Facebook or Twitter, shared widely to the point of going viral, and picked up by news outlets can destroy all but the too-big-to-fail companies or at least seriously damage their brand. In this age of social media, good customer service is crucial to business survivability. A complaint provides a business with both valuable information about customer expectations and an opportunity to win back a customer—as well as their social network if a good endorsement comes of it from the now-satisfied customer—or else risk losing much more than just the one customer.

Effective complaints or claims are politely worded and motivated by a desire to right wrongs and save the business relationship. They're best if they remind the business that you've been a loyal customer (if that's true) and really want to keep coming back, but you need them to prove that they value your business after whatever setback prompted the complaint. If the writer of such messages strikes the right tone, they can end up getting more than they originally bargained for.

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, be clear, precise, and polite about what you want in the opening. If you want financial compensation or a replacement product in the case of a claim, be clear about the amount or model. You could also suggest equivalent or alternative compensation if you stand a poor chance of getting exactly what you want. If you want an error corrected or an apology in response to your complaint, be upfront about it.
2. **Body:** The message body justifies the request with a narrative account of what should have happened versus what actually happened instead. Be objective in writing the account because an angry tone coming through in negative words, accusations, and exaggerations will only undermine the validity of your complaint or claim. Be precise in such details as names, dates and times, locations (addresses), and product names and numbers. Wherever possible, provide and refer to evidence. For instance, you may include copies (definitely not originals) of documentation such as receipts, invoices, work orders, bills of lading, emails (printed), phone records, photographic evidence, and even video (e.g., of a damaged product).
3. **Closing:** No matter what prompted the complaint or claim, the closing must be politely worded with action requests (e.g., a deadline) and goodwill statements. Nasty parting shots, even if merely passive-aggressive, may lower your chances of getting what you're asking for. By complimenting the recipient's company however, you up your chances of getting not only what you wanted, but perhaps a little extra. In damage-control mode, the business wants you to feel compelled to tell your friends that the company really turned it around.

Table 24.1: Outline for Complaints or Claims

Outline	Content	Example Message
Subject Line	3- to 7-word title	Refund for unwanted warranty purchase
		Greetings:
1. Opening	Main action request	Please refund me for the $89.99 extended warranty that was charged to my Visa despite being declined at the point of sale.
2. Body	Narrative of events justifying the claim or complaint	This past Tuesday (June 12), I purchased an Acer laptop at the Belleville location of Future Shock Computers and was asked by the sales rep if I would like to add a 3-year extended warranty to the purchase. I declined and we proceeded with the sale, which included some other accessories. When I got home and reviewed the receipt (please find the PDF scan attached), I noticed the warranty that I had declined was added to the bill after all.
3. Closing	Deadlines and/or submission details	Please refund the cost of the warranty to the Visa account associated with the purchase by the end of the week and let me know when you've done so. I have enjoyed shopping at Future Shock for the great prices and customer service. I would sincerely like to return to purchase a printer soon. Much appreciated! Samantha

Notice that the final point in the closing suggests to the store manager that they have an opportunity to continue the business relationship if all goes well with the correction. The implication is that a special deal on the printer will smooth things over.

Replying to Complaints or Claims

If a company grants what the complainant or claimant has asked for, communicating this is called an **adjustment** message. An adjustment letter or email is heavy on courtesy in letting the disappointed customer know that they are valued and will be (or have already been) awarded what they were asking for, and possibly even a little extra. In the case of coupons for discounts on future purchases, the little extras help smooth things over and win back the customer's confidence, hopefully so they will tell their friends that the store or company is worthy of their business after all.

Adjustment Message Organization

An adjustment message takes the direct approach by immediately delivering the good news about granting the claimant's request. Though you would probably start with an apology if this situation arose in person, starting on a purely positive note is more effective in a written message. Tone is also important here; resist the urge to shame the customer—even if they're partly to blame or if part of you still suspects that the claim is fraudulent. If you're going to grant the claim, write it whole-heartedly as if others will be able to see it and judge whether your company has good customer service or if you're going to be jerks about it.

Though a routine adjustment letter might skip a message body, a more serious one may need to go into more detail about how you are complying with the request or take the time to explain what your company is doing to prevent the error again. Doing this makes the reader feel as though making the effort to write will have made a positive impact in the world, however small, because it will benefit not only you, but also everyone else who won't have to go through what you did. Even if you have to explain how the customer can avoid this situation in the future (e.g., by using the product or service as it was intended), putting the responsibility partly on their shoulders, do so in entirely positive terms (see unit 13 on using positive language and a list of negative words to avoid). An apology might also be appropriate in the message body.

Table 24.2: Outline for Adjustment Messages Replying to Complaints and Claims

Outline	Content	Example Message
Subject Line	Identify the previous subject line	Re: Refund for unwanted warranty purchase
		Hello, Samantha:
1. Opening	Main point about granting the request	Absolutely, we would be happy to refund you for the $90 warranty mistakenly charged along with your purchase of the Acer laptop. For your inconvenience, we will also offer you a $20 gift card for future purchases at our store.
2. Body	Details of compliance and/or assurances of improved process	To receive your refund and gift card, please return to our Belleville location with your receipt and the credit card that was charged, so that we can credit the same card $90. (For consumer protection reasons, we are unable to complete any transactions without the card.) We are sorry for inconveniencing you and will speak with all sales staff about the importance of carefully checking the accuracy of any bill of sale before sending the order for payment. To ensure that this doesn't happen again, we will also instruct sales staff to confirm with customers whether an extended warranty appearing on the sales bill is there with consent before completing any transaction.
3. Closing	Courteous statements expressing confidence in future business relations	We appreciate your choosing Future Shock for your personal electronics and look forward to seeing you soon to credit your Visa card and provide you with the best deal in town on the printer you were looking to purchase. Have a great day! Melissa

Apologizing

Apologizing is tricky because it is essential to winning back customer confidence in some situations, but also leaves you or your company open to legal action in others. For minor matters, admitting fault with an apology usually helps vindicate or validate the customer. In more serious matters, especially involving injury or damage to property or even someone's reputation (and thus their earning potential), a written apology might be read as admitting fault and be used as evidence in court. For this reason, it's best to ask a manager or legal department for guidance on apologizing to a customer or other stakeholder in writing.

If apologizing is appropriate because you genuinely erred, no legal repercussions are expected, and it's the right thing to do when trying to soothe an angry response and mend a damaged business relationship, ensure that the apology has the following four characteristics:

- **Sincere:** Saying "We are genuinely sorry that you were disappointed with the customer service experience" is a good first step, but requires some additional assurances to prove it.
- **Responsible:** Own the error by admitting fault (again, only if it doesn't open you to litigation). Say what should have happened versus what actually happened and acknowledge that you were wrong.
- **Specific:** To be sincere, an apology must refer to a specific error by briefly describing it, possibly including dates, locations, and the names of people responsible or affected, if appropriate. The worst apologies are blanket, generic statements such as "We're sorry if anyone was offended by our actions."
- **Improvement-focused:** An apology is useless unless it includes some assurances that the error won't happen again. Simply saying it won't happen again isn't as convincing as describing what will be done to ensure that it won't, as well as following through on it. When Starbucks apologized for a racist incident at one of its locations in 2018, for instance, it followed through on a plan for improving customer service by shutting down all of its stores for a half-day so that employees could receive racial sensitivity training (Dangerfield, 2018).

Apologizing may even be necessary when you're not really in the wrong, but the customer's or public's perception is that you are. In crisis communications, effective apologies show that you care enough about your existing and potential clientele to say and do what it takes to win back their trust and confidence in you. You can do this without falsely claiming that you made an error (if you genuinely didn't) by saying that you apologize for the misunderstanding. Dismissing complaints and doubling down on an error, on the other hand, shows a brazen disrespect for the people your success depends on.

Key Takeaway

When something goes wrong in a commercial situation, courteous communication is essential when both asking for and responding to complaints and claims.

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Unit 25: Negative Messages

Learning Objectives

1. Organize and write negative messages using the direct and indirect approach.
2. Understand the importance of communicating bad news carefully in professional contexts.

Just as in life, the workplace isn't always sunny. Sometimes things don't go according to plan, and it's your job to communicate about them in a way that doesn't ruin your relationships with customers, coworkers, managers, the public, and other stakeholders. When doing damage control, bad-news messages require care and skillful language because your main point will meet resistance. Rarely are people okay being told that they're laid off, their application has been rejected, their shipment got lost en route, prices or rates are increasing, their appointment has to be moved back several months, or they're losing their benefits. Though some people prefer that the messenger be blunt about it, in most cases you can assume that the receiver will appreciate or even benefit by a more tactful, indirect approach. Keep in mind the following advice whenever required to deliver unwelcome news.

Negative Messages Topics

The Seven Goals of Bad-news Messages

Your ability to manage, clarify, and guide understanding is key to addressing challenging situations while maintaining trust and integrity with customers, coworkers, managers, the public, and other stakeholders. Keep in mind these seven goals when delivering bad news in person or in writing:

1. Be clear and concise to avoid being asked for additional clarification.
2. Help the receiver understand and accept the news.
3. Reduce the anxiety associated with the bad news as much as possible by expressing sympathy or empathy.
4. Maintain trust and respect between you and your audience to ensure the possibility of good future relations.
5. Deliver the bad news in a timely fashion in the appropriate channel(s).

6. Avoid the legal liability that comes with admitting negligence or guilt.
7. Achieve the designated business outcome.

Let's look at how we can achieve these goals in examples of the tricky situations in which we might find ourselves in the workplace.

Let's say you are a supervisor and your manager has tasked you with getting Chris, an employee who is usually late for work and has been arriving even later recently, to start arriving on time. Chris's tardiness is impairing not only his performance but also that of the entire team that depends on his work. You figure there are four ways you can handle this:

1. Stop by Chris's cubicle and simply say, "Get to work on time or you're out"
2. Invite Chris out to a nice lunch and let him have it
3. Write Chris a stern email
4. Ask Chris to come to your office and discuss the behaviour with him in private

Let's see how each of these alternatives meets our seven goals in delivering bad news.

First, if you approach Chris with a blunt ultimatum at his desk, you can get right to the point there but risk straining the supervisor-employee relationship by putting him in his place in front of everyone. The aggressive approach might prompt Chris to demand clarification, make defensive excuses, or throw hostile counter-offensives right back—none of which are desired outcomes. For that matter, the disrespectful approach doesn't formally confirm that the tardiness will end. The lack of tact in the approach may reflect poorly on you as the supervisor, not only with Chris but with your manager as well.

When you need to speak to an employee about a personnel concern, it is always best to do so in private. Give thought and concern to the conversation before it occurs and make a list of points to cover with specific information, including grievances. Like any other speech, you may need to rehearse, particularly if this type of meeting is new to you. When it comes time to have the discussion, issue the warning, back it up in writing with documentation, and don't give the impression that you might change your decision. Whether the issue at hand is a simple caution about tardiness or a more serious conversation, you need to be fair and respectful, even if the other person has been less than professional. Let's examine the next alternative.

Let's say you invite Chris to lunch at a nice restaurant. He sees the fine linen on the table, silverware for more than the main course, and water glasses with stems. The luxurious environment says "good job," but your serious talk will contradict this nonverbal signage, which will probably be an obstacle to Chris's ability to listen. If Chris doesn't understand and accept the message, requiring him to seek clarification, your approach has failed. Furthermore, the ambush fails to build trust, so you don't know whether Chris is going to make the extra effort to arrive early or just put in his time there doing the bare minimum while looking for another job.

Let's say instead that you've written Chris a stern email. You've included a list of all the recent dates when he was late and made several statements about the quality of his work. You clearly say he needs to improve and stop being late, or else. But was your email harassment? Could it be considered beyond the scope of supervision and interpreted as mean or cruel? And do you even know if Chris has received it? If there was no reply, do you know whether it achieved its desired business outcome? A written message may certainly be part of the desired approach, but how it is presented and delivered is as important as what it says. Let's examine our fourth approach to this scenario.

You ask Chris to join you in a private conversation. You start by expressing concern and asking an open-ended question: "Chris, I've been concerned about your work lately. Is everything all right?" As Chris answers, you may demonstrate that you are listening by nodding your head and possibly taking notes. You may learn that Chris has been having problems sleeping or that his living situation has changed. Or Chris may decline to share any issues, deny that anything is wrong, and ask why you are concerned. You may then state that you've observed the chronic tardiness and name one or more specific mistakes you have found in Chris's work, ending by repeating your concern. Because showing your concern makes Chris feel valued, he opens up about his situation so that you understand. It may turn out that he has to drop his kids off for school at 8 a.m. and then contend with Queensway traffic for the next hour to get to the office, consistently making him a half hour late. You can then both agree that he'll stay a little later or put in the missing hours at home, then write up that agreement in an email with your manager Cc'd.

Regardless of how well or poorly the conversation goes, if Chris tells other employees about it, they will take note of how you handled the situation, and it will contribute to their perception of you. It guides their expectations of how you operate and how to communicate with you as this interaction is not only about you and Chris. You represent the company and its reputation, and your professional display of concern as you try to learn more sends a positive message. While the private, respectful meeting may not be the perfect solution, it is preferable to the other approaches considered above.

One additional point to consider as you document this interaction is the need to present the warning in writing. You may elect to prepare a memo that outlines the information concerning Chris's performance and tardiness and have it ready should you want to present it. If the session goes well, and you have the discretion to make a judgment call, you may elect to give him another week to resolve the issue. Even if it goes well, you may want to present the memo, as it documents the interaction and serves as evidence of due process should Chris's behaviour fail to change, eventually resulting in the need for termination. This combined approach of a verbal and written message is increasingly the norm in business communication (Business Communication for Success, 2015).

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Indirect Bad-news Message Organization

Key to achieving Goal #2 of delivering bad news—i.e., helping the receiver understand and accept information they don't want to hear or read—is organizing the message using the indirect approach described in unit 11 . If you tactlessly provide your audience with really bad news, you run the risk of them rejecting or misunderstanding it because they may be reeling from the blow and be too distracted with anger or sadness to rationally process the explanation or instructions for what to do about the bad news. A doctor never delivers a really serious diagnosis by coming right out and saying "You have cancer!" first thing. Instead, they try to put a positive spin on the results ("It could be worse"), discuss test results in detail, talk about treatment options, and only then come around to telling the patient the bad news. At that point, being clear about the bad news ensures that the receiver understands the gravity of the situation and is therefore motivated to follow through on the therapeutic recommendations given earlier. Key to avoiding misunderstandings when delivering bad news, then, is the following four-part organization:

1. Buffer
2. Reasons
3. Bad news
4. Positive closing

This is much like the three-part structure we've seen before, only the body is now divided into two distinct parts where the order really matters, as we see in Table 26.1 and the explanation for each part below it.

Table 25.1: Bad News Message Outline and Message Example

Part	Message Example
1. Buffer	Thank you for your order. We appreciate your interest in our product and are confident you will love it.
2. Reasons	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	This unexpected increase in demand has resulted in a temporary out-of-stock/backorder situation. Despite a delay of 2-3 weeks, we will definitely fulfill your order as it was received at 11:57 p.m. on October 9, 2018, as well as gift you a $5 coupon towards your next purchase.
4. Positive 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)

Bad-news Message Buffer

Begin with neutral or positive statements that set a goodwill tone and serve as a **buffer** for the information to come. A buffer softens the blow of bad news. The following are some possible buffer strategies:

- **Good news**: If there's good news and bad news, start with the good news.
- **Compliment**: If you're rejecting someone's application, for instance, start by complimenting them on their efforts and other specific accomplishments you were impressed by in their application.
- **Gratitude**: Say thanks for whatever positive things the recipient has done in your dealings with them. If they've submitted a claim that doesn't qualify for an adjustment, for instance, thank them for choosing your company.
- **Agreement**: Before delivering bad news that you're sure the recipient is going to disagree with and oppose, start with something you're sure you both agree on. Start on common ground by saying, "We can all agree that . . . ."
- **Facts**: If positives are hard to come by in a situation, getting started on the next section's explanation, starting with cold, hard facts, is the next best thing.

- **Understanding**: Again, if there are no silver linings to point to, showing you care by expressing sympathy and understanding is a possible alternative (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 unit 24 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 to put them in a receptive frame of mind for understanding the explanation that follows. If you raise the expectation that they're going to hear the good news that they're getting what they want only, to let them down near the end, they're going to be even more disappointed for being led on. If you give them the bad news right away, however, they may be more distracted with emotion to rationally process the explanation or instructions for what to do about the bad news.

Bad-news Justification (reasons)

The **justification** explains the background or context for the bad news before delivering the bad news itself. Let's say that you must reject an application, claim for a refund, or request for information. In such cases, the explanation could describe the strict acceptance criteria and high quality of applications received in the competition, the company policy on refunds, or its policy on allowable disclosures and the legalities of contractually obligated confidentiality, respectively. Your goal with the explanation is to be convincing so that the reader says, "That sounds reasonable" and similarly accepts the bad news as inevitable given the situation you describe. On the other hand, if you make the bad news seem like mysterious and arbitrary decision-making, your audience will probably feel like they've been treated unfairly and might even escalate further with legal action or "yelptribution"—avenging the wrong in social media. While an explanation is ethically necessary, never admit or imply responsibility without written authorization from your company cleared by legal counsel if there's any way that the justification might be seen as actionable (i.e., the offended party can sue for damages).

Use additional strategies to make the justification more agreeable such as focusing on benefits. If you're informing employees that they will have to pay double for parking passes next year in an attempt to reduce the number of cars filling up the parking lot, you could sell them on the health benefits of cycling to work or the environmental benefit of fewer cars polluting the atmosphere. If you're informing a customer asking why a product or service can't include additional features, you could say that adding those features would drive the cost up and you would rather respect your customer's pocketbooks by keeping the product or service more affordable. In any case, try to pitch an agreeable, pro-social or progressive benefit rather than saying that you're merely trying to maximize company or shareholder profits.

The Bad News

Burying the bad news itself in the message is a defining characteristic of the indirect approach. It's akin to the "hamburger" organization of constructive criticism sandwiched between statements of praise. Far from intending to hide the bad news, the indirect approach frames the bad news so that it can be properly understood and its negative (depressing or anger-arousing) impact minimized.

The goal is also to be clear in expressing the bad news so that it isn't misunderstood while also being sensitive to your reader's feelings. If you're rejecting a job applicant, for instance, you can be clear that they didn't get the job without bluntly saying "You failed to meet our criteria" or "You won't be working for us anytime soon." Instead, you can clearly imply it by putting the bad news in a subordinate clause in the passive voice:

> *Though another candidate was hired for the position, . . .*

The passive voice enables you to draw attention away from your own role in rejecting the applicant, as well as away from the rejected applicant in the context of the competition itself. Instead, you focus on the positive news of someone getting hired. While the rejected applicant probably won't be pleased for the winning candidate, the subordinate clause here allows for speedy redirection to a consolation prize.

Redirection is key to this type of bad news' effectiveness because it quickly shifts the reader's attention to an alternative to what they were seeking in the first place. Some kind of consolation prize (e.g., a coupon or store credit) helps soothe the pain and will be appreciated as being better than nothing, at least. Even if you're not able to offer the reader anything of value, you could at least say something nice. In that case, completing the sentence in the previous paragraph with an active-voice main clause could go as follows:

> *. . . we wish you success in your continued search for employment.*

This way, you avoid saying anything negative while still clearly rejecting the applicant.

Positive Closing

As we've seen in previous explorations of message organization (e.g., see unit 17 on email), the closing here involves action information. If your redirection involves some alternative, such as a recommendation to apply elsewhere, some follow-up details here would help the reader focus on the future elsewhere rather than getting hung up on you and your company's decision. Your goals here are the following

- Ensure that the reader understands the bad news without rehashing it
- Remain courteous, positive, and forward-looking
- End the conversation in such a way that you don't invite further correspondence

The first and last goals are important because you don't want the reader to respond asking you to clarify anything. The second goal is important because you ultimately want to appear respectable and avoid giving the reader a reason to smear your reputation in social media or proceed with legal action against you.

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Avoiding Disaster in Bad-news Messages

Delivering bad news can be dangerous if it angers the reader so much that they are motivated to fight back. If you're not careful with what you say, that message can be used as evidence in a court case that, when read by a judge or jury, could compromise your position. You can lower the risk of being litigated against by following the general principles given below when delivering bad news.

Avoid Negative or Abusive Language

Sarcasm, profanity, harsh accusations, and abusive or insulting language may feel good to write in a fit of anger but, in the end, make everyone's lives more difficult. When someone sends an inflammatory message and it's interpreted by the reader as harmful to their reputation, it could legally qualify as libel that is legitimately actionable. Even if you write critically about a rival company's product or service by stating (as if factually) that it's dangerous, whereas your version of the product or service is safer and better, this can be considered defamation or libel. If said aloud and recorded, perhaps on a smart phone's voice recorder, it is slander and can likewise be litigated. It's much better to always write courteously and maturely, even under difficult circumstances, to avoid fallout that involves expensive court proceedings.

Avoid Oversharing but Tell the Truth

When your job is to provide a convincing rationale that might make the recipient of bad news accept it as reasonable, be careful with what details you disclose. When rejecting a job applicant, for instance, you must be especially careful not to share the scoring sheets of the winning and rejected candidates, nor even summarize them. Though that would give them full picture, it would open you up to a flood of complaints and legal or human-rights challenges picking apart every little note. Instead, you would simply wish the rejected candidate luck in their ongoing job search. When you must provide detail, avoid saying anything bad about anyone so that you can't be accused of libel and taken to court for it. Provide only as much information as is necessary to provide a convincing rationale.

At the same, it's important that you tell the truth so that you can't be challenged on the details. If you are inconsistent or contradictory in your explanation, it may invite scrutiny and accusations of lying. Even making false claims by exaggerating may give the reader the wrong impression, which can lead to serious consequences if acted upon. Though some might say that omitting the truth is a form of lying, telling the truth selectively is the necessary compromise of a professional constrained by competing obligations to both the organization they represent and the reader who they don't want to anger or severely disappoint.

Respect the Recipient's Privacy

Criticizing an employee in a group email or memo—even if the criticism is fair—is mean, unprofessional, and an excellent way of opening yourself to a world of trouble. People who call out others in front of a group create a chilly climate in the workplace, one that leads to fear, loathing, and a loss of productivity among employees, not to mention legal challenges for possible libel. Called-out employees may even resort to sabotaging the office with misbehaviour such as vandalism, cyberattacks, or theft to get even. Always maintain respect and privacy when communicating bad news as a matter of proper professionalism (Business Communication for Success, 2015).

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Direct-approach Bad-news Messages

We've so far looked at expressing bad news using the indirect approach, but is it ever right to deliver bad news using the direct approach? Are there occasions where you can or should be upfront about the bad news? In the following situations, yes, it's certainly appropriate to deliver bad news by getting right to the point:

- **When the bad news does not have a high emotional impact:**
  - In the case of small price or rate increases, customers won't be devastated by having to pay more. Indeed, inflation makes such increases an expected fact of life.
  - If your job involves routinely delivering criticism because you're a Quality Assurance specialist, the people who are used to receiving recommendations to improve their work will appreciate the direct approach. Some organizations even require direct-approach communications for bad news as a policy because it is more time-efficient.
- **When you know that the recipient prefers or requires the direct approach:** Though the indirect approach is intended as a nice way to deliver bad news, some people would rather you be blunt. "Give it to me straight, doc. I'm a grown-up. I can take it," they might say. Since a message must always be tailored to the audience, getting permission for taking the direct approach is your cue to follow through with exactly that. Not doing so will arouse the angry response you would have expected otherwise.
- **When you're short on time or space:** One of the hallmarks of the indirect approach is that it takes more words than a direct-approach message (see unit 17 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, 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., unit 17 on email parts):

1. **Opening:** State the bad news right up front.
2. **Reasons:** Briefly explain why the bad news happened.
3. **Positive Closing:** Express confidence in continued business relations with a goodwill statement and provide any action information such as contact instructions should the recipient require further information.

Of course, clarity and brevity in such messages is vital to maintaining friendly relations with your audiences (Guffey et al., 2016, p. 190).

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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 a positive closing to minimize the harm that the message might cause.

Exercise

1. Sales have decreased for two consecutive quarters at your business. You must inform your sales team that their hours and base pay will be reduced by 20 percent if the company is to break even this quarter. While you may have a few members of your sales team that are under performing, you can't afford to be short-staffed now, so you must keep the entire team for the time being. Write negative news messages informing your sales team.

Would you use the direct or indirect approach?

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Unit 26: Persuasive Messages

Learning Objectives

1. Write persuasive messages using the AIDA method.
2. Understand the importance of persuasion in professional contexts.

Persuasion involves moving or motivating your audience by presenting arguments that convince them to adopt your view or do as you want. You've been doing this ever since you learned to speak. From convincing your parents to give you a treat to persuading them to lend you the car keys, you've developed more sophisticated means of persuasion over the years simply because of the rewards that come with their success. Now that you've entered (or will soon enter) the professional world, honing persuasive strategies for the workplace is vital to your livelihood when the reward is a sale, a promotion, or merely a regular paycheque.

Persuasion begins with motivation. If persuasion is a process and your audience's action (e.g., buying a product or service) is the goal, then motivating them to accept an argument or a series of positions leading to the decision that you want them to adopt helps achieve that goal. If your goal is to convince a pet owner to spay or neuter their pet, for instance, you would use a few convincing arguments compelling them to accept that spaying or neutering is the right thing to do.

The Rhetorical Triangle

Use the **rhetorical triangle** by combining logic, emotional appeal, and authority (a.k.a. *logos*, *pathos*, and *ethos* in classical Aristotelian rhetoric) to cater your message to your audience. You could appeal to their sense of reason by explaining the logical consequences of not spaying or neutering their pet: increasing the local cat or dog population, or even producing a litter that you yourself have to deal with, including all the care and expenses related to it. You might appeal to their emotions by saying that the litters resulting from your pet's mating with strays will suffer starvation and disease in their short lives. You could establish your credibility by explaining that you've earned a diploma in the Vet Tech program at Algonquin College and have eight years' experience seeing the positive results that spaying or neutering has on local dog or cat populations, making you a trustworthy authority on the topic. All of these moves help overcome your audience's resistance and convince them to follow your advice (*Business Communication for Success*, 2015). These three appeals can also complement other effective techniques in persuading an audience as we shall see throughout this section.

Principles of Persuasion

What's the best way to succeed in persuading people to buy what you're selling? Though there may sometimes be a single magic bullet, a combination of strategies has been found to be most effective. Social psychologist Robert Cialdini offers us six principles of persuasion that are powerful and effective no matter what the cultural context. Use them to help persuade people, but also recognize their use by others when determining how you're being led towards a purchase, perhaps even one you should rightly resist.

Principle of Reciprocity

I scratch your back; you scratch mine. Reciprocity means that when you give something to somebody, they feel obligated to give something back to you in return, even if only by saying "thank you." If you are in customer service and go out of your way to meet the customer's need, you are appealing to the principle of reciprocity by increasing the likelihood of making a purchase from you because you were especially helpful. Reciprocity builds trust and a relationship develops, reinforcing everything from personal to brand loyalty. By taking the lead and giving, you build in a moment a sense of obligation motivating the receiver to follow social norms and customs by giving back.

Principle of Scarcity

It's universal to want what you can't have. People are naturally attracted to the rare and exclusive. If they are convinced that they need to act now or it will disappear, they are motivated to act. Scarcity is the perception of dwindling supply of a limited and valuable product. For a sales representative, scarcity may be a key selling point—the particular car, theater tickets, or pair of shoes you are considering may be sold to someone else if you delay making a decision. By reminding customers not only of what they stand to gain but also of what they stand to lose, the sales rep increases the chances of swaying the customer from contemplation to action, which is to close the sale.

Principle of Authority

Notice how saying "According to researchers, . . ." makes whatever you say after these three words sound more true than if you began with "I think that . . . ." This is because you're drawing on authority to build trust, which is central to any purchase decision. Who does a customer turn to? A salesperson may be part of the process, but an endorsement by an authority holds credibility that no one with a vested interest can ever attain. Knowledge of a product, field, trends in the field, and even research can make a salesperson more effective by the appeal to the principle of authority. It may seem like extra work to educate your customers, but you need to reveal your expertise to gain credibility. We can borrow a measure of credibility by relating what experts have indicated about a product, service, market, or trend, and our awareness of competing viewpoints allows us insight that is valuable to the customer. Reading the manual of a product is not sufficient to gain expertise—you have to do extra homework. The principle of authority involves referencing experts and expertise.

Principle of Commitment and Consistency

When you commit to something, you feel obligated to follow through on it. For instance, if you announce on social media that you're going to do yoga every day for a month, you feel greater pressure to actually do so than if you resolved to do it without telling anyone. This is because written words hold a special power over us when it feels as though their mere existence makes what we're doing "official." If we were on the fence, seeing it now in writing motivates us to act on it and thereby honour our word by going through with the purchase. In sales, this could involve getting a customer to sign up for a store credit card or a rewards program.

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

Principle of Liking

We are more likely to buy something from someone we like, who likes us, who is attractive, and who we can identify with because we see enough points of similarity between ourselves. These perceptions offer a sense of safe belonging. If a salesperson says they're going to cut you a deal because they like you, your response is to reciprocate that acceptance by going through with the deal. If you find them easy to look at—no matter which sex—you are predisposed to like them because, from an evolutionary standpoint, attractiveness suggests genetic superiority and hence authority. Furthermore, if the salesperson makes themselves relatable by saying that they had the same problem as you and this is what they did about it, you're more likely to follow their advice because that bond produces the following argument in your mind:

"This person and I are similar in that we share a common problem, they solved it expertly by doing X, and I can therefore solve the same problem in my life by doing X" *(Business Communication for Success, 2015)*.

Indirect AIDA Pattern of Persuasion

When you consider the tens or hundreds of thousands of TV commercials you've seen in your life, you understand how they all take the indirect approach because they assume you will resist parting with your money. Instead of taking a direct approach by simply saying in seven seconds "Come to our store, give us $100, and we'll give you these awesome sunglasses," commercials use a variety of techniques to motivate you to ease your grip on your money. They will dramatize a problem-solution scenario, use celebrity endorsements, humour, special effects, jingles, intrigue, and so on. You're well familiar with the pattern from having seen and absorbed it many times each day of your life, but when you must make a persuasive pitch yourself as part of your professional duties, you may need a little guidance with the typical four-part indirect pattern known as "AIDA":

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 chequing account losing value from inflation year after year?

    - Have you ever thought about investing your money but have no idea where to start?
- **Surprising quotation**, fact, or statistic:
    - Yogi Berra once said, "If you come to a fork in the road, take it!" At Epic Adventures, any one of our Rocky Mountain hiking experiences will elevate you to the highest of your personal highs.
    - The shark is the ocean's top predator. When you're looking to invest your hard-earned money, why would you want to swim with sharks? Go to a trusted broker at Lighthouse Financial.
    - Look around the room. One in five of you will die of heart disease. Every five minutes, a Canadian aged 20 or over dies from heart disease, the second leading cause of death in the country. At the Fitness Stop, keep your heart strong with your choice of 20 different cardio machines and a variety of aerobics programs designed to work with your busy schedule.

The goal here is to get the reader thinking, "Oooh, I want *that*" or "I *need* that" without giving them an opportunity to doubt whether they really do. Of course, the attention-gaining opening is unnecessary if the reader already knows something about the product or service. If the customer comes to you asking for further details, you would just skip to the I-, D-, or A-part of the pitch that answers their questions.

I – Interest-building Background

Once you've got the reader's attention in the opening, your job is now to build on that by extending the interest-building pitch further. If your opening was too busy painting a solution-oriented picture of the product to mention the company name or stress a central selling feature, now is the time to reveal both in a cohesive way. If the opening goes "What weighs nothing but is the most valuable commodity in your lives? —Time," a cohesive bridge to the interest-building background of the message could be "At Synaptic Communications, we will save you time by . . . ." Though you might want to save detailed product 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 centre of the action with the "you" view (see unit 13):

> When you log into your WebCrew account for the first time, an interactive AI guide will greet and guide you through the design options for your website step by step. You will be amazed by how easy it is to build your website from the ground up merely by answering simple multiple-choice questions about what you want and selecting from design options tailored to meet your individual needs. Your AI guide will automatically shortlist stock photo options and prepare text you can plug into your site without having to worry about permissions.

Here, the words you or your appear 11 times in 3 sentences while still sounding natural rather than like a high-pressure sales tactic.

D – Desire-building Details and Overcoming Resistance

Now that you've hooked the reader in and hyped-up your product, service, or idea with a central selling feature, you can flesh out the product description with additional **evidence** supporting your previous claims. Science and the rational appeal of hard facts work well here, but the evidence must be appropriate. A pitch for a sensible car, for instance, will focus on fuel efficiency with litres per 100 km or range in number of kilometres per battery charge in the case of an electric vehicle, not top speed or the time it takes to get from 0 to 100 km/h. Space permitting, you might want to focus on only two or three additional selling features since this is still a pitch rather than a product specifications ("specs") sheet, though you can also use this space to point the reader to such details in an accompanying document or webpage.

Testimonials and guarantees are effective desire-building contributions as long as they're believable. If someone else much like you endorses a product in an online review, you'll be more likely to feel that you too will benefit from it. A **guarantee** will also make the reader feel as though they have nothing to lose if they can just return the product or cancel a service and get their money back if they don't like it after all. Costco has been remarkably successful as a wholesaler appealing to individual grocery shoppers partly on the strength of a really generous return policy.

Rhetorically, this point in the pitch also provides an opportunity to raise and defeat objections you anticipate the reader having towards your product, service, or idea. This follows a technique called ***refutation***, which comes just before the conclusion ("peroration") in the six-part classical argument structure. It works to dispel any lingering doubt in the reader's mind about the product as pitched to that point.

If the product is a herbicide being recommended as part of a lawncare strategy, for instance, the customer may have reservations about spreading harmful chemicals around their yard. A refutation that assures them that the product isn't harmful to humans will help here, especially if it's from a trusted source such as Health Canada or *Consumer Reports*. Other effective tricks in the vein of emotional appeal (complementing the evidence-based rational appeal that preceded it) include picturing a worst-case scenario resulting from not using the product. Against concerns about using a herbicide, a pitch could use scare-tactics such as talking about mentioning the spread of wild parsnip that can cause severe burns upon contact with skin and blindness if the sap gets in your eyes. By steering the customer to picturing their hapless kids running naïvely through the weeds in their backyard, crying in pain, rubbing their eyes, and going blind, you can undermine any lingering reservations a parent may have about using the herbicide.

A – Action-motivating Closing

The main point of your message directs the reader to act (e.g., buy your product or service), so its appearance at the end of the message—rather than at the beginning—is what makes an AIDA pitch indirect. If the AID-part of your pitch has the reader feeling that they have no choice but to buy the product or service, then this is the right time to tell them how and where to get it, as well as the price.

Pricing itself requires some strategy. The following are well-known techniques for increasing sales:

- **Charm pricing**: dropping a round number by a cent to make it end in a 99 because the casually browsing consumer brain's left-digit bias will register a price of $29.99 as closer to $20 than $30, especially if the 99 is physically smaller in superscript ($29.99).
- **Prestige pricing**: keeping a round number round and dropping the dollar sign for a luxury item. For instance, placing the number 70 beside a dinner option on a fancy restaurant's menu makes it look like a higher-quality dish than if it were priced at $69.99. To impress a date with your spending power, you'll go for the 70 option over something with charm pricing.
- **Anchoring**: making a price look more attractive by leading with a higher reference price. For instance, if you want to sell a well-priced item, you would strategically place a more expensive model next to it so that the consumer has a sense of the price range they're dealing with when they don't otherwise know. They'll feel like they're getting more of a bargain with the well-priced model. Similarly, showing the regular price crossed out near the marked-down price on the price tag is really successful in increasing sales (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, 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. Even one exaggerated claim can sink the entire message. Saying that your product is the best in the world, but not backing this up with any third-party endorsement or sales figures proving the claim, will undermine every other credible point you make by making your reader doubt it all (Lehman, DuFrene, & Murphy, 2013, pp. 134-143). We'll return to topic of avoidable unethical persuasive techniques, but first let's turn our attention in the next section to a more uplifting type of message.

Key Takeaway

Use reliable strategies and persuasive indirect message patterns to persuade readers to buy products or services, adopt your ideas, or support initiatives.

Exercise

1. Evaluate a persuasive message. List 2 effective and 2 ineffective points about the persuasive message using specific examples and applying it to the AIDA method.

Subject Line: Queen's Fashion Industry Network Conference

Hello Anna,

My name is Kylie and I am reaching out to you on behalf of Queen's University's Fashion Industry Networking (QFIN) Executive Committee. Our team is running a conference in Toronto in January 2020 that aims to allow young adults to network with professionals in the fashion industry, with a focus on sustainability in fashion, as well as the creative (making and designing garments) vs. business perspectives (marketing, finances, etc.) of fashion.

One of my close friends Laura Benson mentioned you may be interested in participating in our event, and I was hoping she might be right!

We would love if you would participate as a panel speaker.

Please see the attached sponsorships package we have prepared for our formal proposal and some more information on the event.

Thank you for your time and consideration.

References

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

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Unit 27: Goodwill Messages and Recommendations

Learning Objective

1. Write routine message types such as goodwill messages.

Share the love! Goodwill messages are as essential to healthy professional relationships as they are in personal ones. Thank-you, congratulatory, and sympathy notes add an important, feel-good human touch in a world that continues to embrace technology that isolates people while being marketed as a means of connecting them. The goodwill that such messages promote makes both sender and receiver feel better about each other and themselves compared with where they'd be if the messages weren't sent at all. In putting smiles on faces, such notes are effective especially because many people don't send them—either because they feel that they're too difficult to write or because it doesn't even occur to them to do so. Since praise for some can be harder to think of and write than criticism, a brief guide on how to do it right may be of help here.

Goodwill Messages and Recommendations Topics

The 5 S's of Goodwill Messages

Whether you're writing thank-you notes, congratulatory messages, or expressions of sympathy, follow the "5 S" principles of effective goodwill messages:

- **Specific:** Crafting the message around specific references to the situation that it addresses will steer such messages away from the impression that they were boilerplate template statements that you plagiarized.
- **Sincere:** A goodwill message will come off as genuine if it's near to what you would say to the recipient in person. Avoid cliché Hallmark-card expressions and excessive formality such as It is with a heavy

heart that I extend my heartfelt condolences to you in these sad times.

- **Selfless:** Refer only to the person or people involved rather than yourself. The spotlight is on them, not you. Avoid telling stories about how you experienced something similar in an attempt to show how you relate.
- **Short:** Full three-part messages and three-part paragraphs are unnecessary in thank-you notes, congratulatory messages, or expressions of sympathy, but appropriate in recommendations that require detail. Don't make the short length of the message deter you from setting aside time to draft it.
- **Spontaneous:** Move quickly to write your message so that it follows closely on the news that prompted it. A message that's passed its "best before" date will appear stale to the recipient and make you look like you can't manage your time effectively (Guffey et al., 2016, p. 144).

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Thank-you Notes

In the world of business, not all transactions involve money. People do favours for each other, and acknowledging those with thank-you notes is essential for keeping relations positive. Such messages can be short and simple, as well as quick and easy to write, which means not sending them when someone does something nice for you appears ungrateful, rude, and inconsiderate. Someone who did you a favour might not bother to do so again if it goes unthanked. Such notes are ideal for situations such as those listed in Table 27.1:

Table 27.1: Common Reasons for Expressing Thanks in Professional Situations

Sender	Recipient	Favour
Employer	Employee	The employee went above and beyond the call of duty, perhaps under exceptionally difficult circumstances.
Employee	Employer	The employer gave the employee an opportunity for promotion.
Employee	Coworker	The employee mentored the co-worker so that the latter looked good to customers and management.
Applicant	Employer	The employer is considering hiring the job applicant, who sends a thank-you message within 24 hours after a job interview.
Applicant	Previous employer	The job applicant sends their previous employer a thank-you note for endorsing them as a reference.
Business	Customer	The customer ordered products or services.
Business	Customer	The customer complained about the service, enabling the business to improve and better meet customer expectations.
Business	Another business	One business endorsed another, directing customers their way.
Customer	Employee	The employee (e.g., restaurant server) demonstrated exceptional customer service, perhaps under difficult circumstances.
One person	another	One person's act of kindness, including kind words said or sent, gifts given, or hospitality extended, was appreciated.

In most situations, email or text is an appropriate channel for sending thank-you messages. In fact, sending a thank-you note within 24 hours of interviewing for a job is not just extra-thoughtful but close to being an expected formality. To stand out from other candidates, hand-writing a thank-you card in such situations might even be a good idea.

Following the 5 S's of goodwill messages, a typical thank-you email message for a favour might look like the following:

Hi Alanna,

I just wanted to thank you for putting in a good word for me with your manager. She told me today that I came highly recommended, and I knew right away who that came from—only the most kind and thoughtful person I've ever had the pleasure of working with! I really appreciate all the help you've given me over the years, but especially for bringing me this opportunity. It means a lot to me and my family.

If there's anything I can help you with in return—anything at all—you name it. I owe you one.

Many thanks,

Jeremy

Notice that this message is short, specific to the situation that prompted it, sincere, relatively selfless, and spontaneously sent the day of the incident that prompted it. It would certainly bring a smile both to the recipient and sender, strengthening their professional bond.

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Congratulatory Messages

Celebrating the successes of your professional peers shows class and tact. It's good karma that will come back around as long as you keep putting out positive energy. Again, the 5 S's apply in congratulatory messages, especially selflessness. Such messages are all about the person you're congratulating. You could say, for instance, I really admire how you handled yourself with such grace and poise under such trying circumstances in the field today.

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Expressions of Sympathy

Few situations require such sincerity and care with words as expressions of sympathy. Misfortune comes upon us all, and tough times are just a little more tolerable with the support of our friends, family, and community—including those we work with. When the loved-one of a close associate dies, for instance, expressing sympathy for their loss is customary, often with a card signed by everyone in the workplace who knows the bereaved. You can't put an email on the mantle like you can a collection of cards from people showing they care.

What do you say in such situations? A simple *I'm so sorry for your loss*, despite being a stock expression, is better than letting the standard Hallmark card's words speak for you (Guffey et al., 2016, p. 147). In some situations, laughter—or at least a chuckle—may be the best medicine, in which case something along the lines of Emily McDowell's witty Empathy Cards would be more appropriate. McDowell's *There Is No Good Card for This: What to Say and Do When Life Is Scary, Awful, and Unfair to People You Love* (2016) in collaboration with empathy expert Kelsey Crowe, PhD, provides excellent advice. Showing empathy by saying that you know how hard it can be is helpful as long as you don't go into any detail about their loss or yours. Remember, these messages should be selfless, and being too specific can be a little dangerous here if it produces traumatic imagery. Offering your condolences in the most respectful, sensitive manner possible is just the right thing to do.

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Replying to Goodwill Messages

It wouldn't go over well if someone thanked you for your help and you just stared at them silently. The normal reaction is to simply say *You're welcome!* Replying to goodwill messages is therefore as essential as writing them. Such replies must be even shorter than the messages that they respond to. If someone says a few nice things about you in an email about something else, always acknowledge the goodwill by saying briefly "Thank you very much for the kind words" somewhere in your response. Without making a mockery of the situation by thanking a thank-you or shrugging off a compliment, returning the love with nicely worded and sincere gratitude is the right thing to do (Guffey et al., 2016, p. 147).

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Recommendation Messages and Reference Letters

Recommendation messages are vital to getting hired, nominated for awards, and membership into organizations. They offer trusted-source testimonials about a candidate's worthiness for whatever they're applying to. Like the résumé and cover letter they corroborate, their job is to persuade an employer or selection committee to accept the person in question. To be convincing, recommendation and reference letters must be the following:

- **Specific:** Recommendation and reference letters must focus entirely on the candidate with details such as examples of accomplishments, including dates or date ranges in months and years. A generic recommendation plagiarized from the internet is worse than useless because it makes the applicant look like they're unworthy of a properly targeted letter.
- **True:** Exaggerations and outright lies will hurt the candidate when found out (e.g., in response to job interview questions and background checks). They will spoil the chances of any future applicants who use recommendations from the same untrustworthy source if the employer sees that source cross their desk again.
- **Objective:** An endorsement from a friend or family member will be seen as subjective to the point of lacking any credibility. Recommendations must therefore come from a business owner, employer, manager, or supervisor who can offer an unbiassed assessment.

Not all employers require recommendation letters of their job candidates, so only bother seeking a recommendation letter when it's asked for. Opinions are divided on whether such documents are actually useful, since they are almost always "glowing" because they tend not to say anything negative about the applicant despite the expectation that they be objective. Some employers—especially in larger organizations—are instructed not to write recommendation letters (or are limited in what they can say if called for a reference) because they leave the company that writes them open to lawsuits from both the applicant and recipient company if things don't work out.

On the other hand, recommendation letters provide potential employers with valuable validation of the job applicant's claims, so it's worth knowing how to ask for one and what to ask for if they're required as part of a hiring process. Even if it may be some years before you're in a position to write such letters yourself, knowing what information to provide the person who agrees to write you a recommendation is useful to you now. Indeed, since most managers are busy people, they might even ask you to draft it for them so they can plug it into a company letterhead template, sign it, and send it along. If so, then you could ghost-write it using the following section as your guide.

Recommendation Letter Organization

A recommendation letter is a direct-approach message framed by a modified-block formal letter using company letterhead (see unit 20). The most effective letters are targeted to an employer for a specific job application, though it's not uncommon to request a "To Prospective Employers" recommendation letter without a recipient address to be distributed as part of any job application. In any case, the following represents the standard expectations employers have for recommendation letter content and organization:

1. **Opening:**
    - Identify the applicant by **name**, the **position** sought, and the **confidential** nature of the letter—e.g., This confidential letter is written at the request of Elizabeth Barrie in support of her application for the position of Legal Assistant at Bailey & Garrick Law.
    - Clarify the writer's **relationship** to the applicant and the **length** of its duration—e.g., For three years I have been Ms. Barrie's supervisor at Stanton & Sons Legal Counsel and can therefore say with confidence that she would be a valuable addition to your firm.
2. **Body:**
    - Identify the job applicant's previous duties—e.g., Ms. Barrie began working for us as a part-time legal research assistant during her studies in the Law Clerk program at Algonquin College. She began with mainly clerical duties such as preparing official legal documents and archiving our firm's records.
    - Give examples of the applicant's accomplishments and professional attributes. Wherever achievements are quantifiable, include numbers—e.g., After initiating and executing a records digitization project involving over 12,000 files, Ms. Barrie conducted more extensive legal research activities. Her superior organizational skills and close attention to detail made her a highly dependable assistant that our six associate lawyers and two partners relied on heavily to conduct research tasks. Her conscientiousness meant that she required very little direction and oversight when performing her duties.
    - Compare the applicant to others—e.g., Without a doubt, Ms. Barrie has been our most productive and trusted legal assistant in the past decade.
3. **Closing:**
    - Summarize and emphatically state the **endorsement**—e.g., Any law firm would be lucky to have such a consummate professional as Ms. Barrie in their employ. I highly recommend her without reservation. If you would like to discuss this endorsement further, please contact me at the number above.

Because honesty is of paramount importance in a recommendation letter, including specific evidence of performance flaws wouldn't be out of place, especially if used in a narrative of promotion and improvement. Including criticism of the candidate helps the credibility of the endorsement because it makes it more believable. After all, no one is perfect. Criticism resolved by a narrative of improvement, however, strengthens the endorsement even further. Consider, for instance, how good this looks:

Ms. Barrie tended to sacrifice quantity of completed research tasks to quality, completing perhaps 17 out of an expected 25 assignments per day. However, she increased her speed and efficiency such that, in her last year with us, she was completing more tasks with higher accuracy than any other assistant we've ever had.

Of course, this general frame for recommendations can be adapted and either extended or trimmed for channels other than letters. LinkedIn, for instance, allows users to endorse each other, but the small window in which the endorsement appears favours a smaller wordcount than the typical letter format. In that case, one paragraph of highlights and a few details is more appropriate than several paragraphs, especially if you can get several such endorsements from a variety of network contacts.

How to Request a Recommendation Letter

When a recommendation is necessary, be sure to ask a manager or supervisor who's known you for two years or more if they can provide you with a *strong* reference. If they can't—because they're prohibited from doing so by company policy or they honestly don't think you're worthy of an endorsement—they'll probably just recommend that you find and ask someone who would. Don't be shy about asking for one, though. If they aren't directed otherwise, management understands that writing such messages is part of their job. They got to where they are on the strength of references and recommendations from their previous employers, and the "pay-it-forward" system compels them to provide the same for the people under—people like you. That way, you too can move up in your career.

Knowing that every employment situation you're in provides an opportunity for a reference when it's time to move on, you should always do your best so that you can get a strong reference out of it. Consider also that if a résumé lists references at the end but omits them for certain job experiences, a hiring manager will wonder why you weren't able to get a reference for that job. It certainly could have been due to company policy prohibiting managers from providing references for legal reasons or conflict with management that was entirely their fault; without the full picture, however, the omission opens the door to doubts about the candidate.

Return to the Goodwill Messages and Recommendations Topics Menu

Key Takeaway

Despite being treated by some as optional, goodwill messages are essential to healthy professional relationships and professional advancement as long as you follow the writing conventions associated with them.

Reference

Guffey, M.E., Loewy, D., & Almonte, R. (2016). *Essentials of business communication* (8th Can. ed.). Toronto: Nelson.

PART IX JOB APPLICATIONS

This is one of the most important parts of this book. Resumes and cover letters will be some of the most important written documents that you will create. A resume should always be a work in progress that is updated every time you gain new knowledge and skills from your education, internships, employment and even volunteer experience. A cover letter should be written as a persuasive message that is selling "you". Make sure to customize for employer and job position.

In this part, we will cover:

- The Job Search
- Resumes and Online Applications
- Cover Letters

Unit #28: The Job Search

Learning Objectives

1. Identify individual skills, strengths, and experiences.
2. Research the job market to identify career opportunities and requirements.

Today both job seekers and recruiters have more ways than ever to connect with one another. Though the traditional means of in-person networking are still necessary, online networking has also become the norm. As in the world of dating, technology can certainly help connect people according to compatible interests and preferences; from there, however, the relationship depends entirely on how things go in person. This unit examines the spectrum of job search tools and techniques available to the modern job seeker.

Assess Your Skills and Qualifications

The first step to putting together a winning résumé is to list your employable skills and qualifications. Which of your qualities make you hireable? If these don't come immediately to mind or the wording eludes you, a good place to start is the vocational learning outcomes of your current academic program. These describe the skills that industry employers have said graduates must have to be considered for hire. Find these on the program webpage for your academic institution. Though they are quite general, you can find more specific learning outcomes on the syllabus for each course in the program. Every Algonquin College course outline, for instance, lists Course Learning Requirements (CLRs) and a more detailed list of Embedded Knowledge and Skills under each CLR. If you did well in these courses, these general and specific learning outcomes describe what you are now able to do.

Of course, you can't possibly put all of these on a résumé because the full list would include too many, be too detailed, and would be worded in a manner unsuitable for a résumé. At this point, however, what's important is that you begin a master list of such skills that you can tailor for the résumé when you see what skills and duties employers list in their job postings. Matching the skills you have with those employers want is the key to a successful application.

In addition to program-specific skills, you can also add a range of other skills. Get started by asking yourself the following questions:

- What specific computer programs am I good at? Do I have examples of work I can show an employer of how I've used them at an intermediate or advanced level?
- Do I work well with others? Have I demonstrated this with my employment experience or with volunteer or extracurricular activities such as league sports or clubs?

- Am I better at following instructions or giving them? Am I destined for leadership roles? What proof can I offer up either way?
- Can I read, write, and converse in another language besides English? At what level of proficiency?
- Am I a quick learner? Am I a creative thinker? Can I think of specific instances as proof of my answers to these questions if asked in a job interview?
- Am I a good communicator in both written and spoken situations? What evidence can I offer employers of my proficiency in both? (Guffey, Loewy, & Almonte, 2016, pp. 377-378)

Not only will a few pages of notes in answer to these questions help you prepare résumés and cover letters, but they will also help you prepare for the job interview later.

Find Job Postings

Though the major job search engines like Monster and Indeed are good places to start, they should be only a part of a broader job-search strategy. Both job seekers and employers have their objections to these sites. To seekers, applying through them can be frustrating for the following reasons:

- Some will strip out the formatting you've meticulously assembled for your résumé and cover letter
- Submitting confidential information about yourself to them feels risky
- They can feel like vast abysses into which you send dozens of applications you've laboured over for hours, but without ever receiving a response back

To employers and recruiters, the big job sites attract a flood of poor-quality applicants from around the world, leaving the hiring manager or committee with the time-intensive job of sorting out the wheat from the chaff—i.e., the applicants worth seriously considering from the droves of under-qualified applicants taking shots in the dark with what amounts to spam applications. With such a demanding selection process, employers simply don't have time to respond to them all.

Nonetheless, ignoring these sites altogether would be a mistake because too many employers use them to advertise positions. When your full-time job is just to find a full-time job, you can't leave any stone unturned. The following are sites worth searching for job postings and other information they offer on the job market:

- Job Bank
- Monster
- Indeed
- Workopolis
- CareerBuilder
- Eluta
- Jobboom
- Glassdoor
- SimplyHired
- WOWjobs

- Charity Village for non-profit and volunteer positions

A search for the jobs available in the career you're training for may yield depressingly few hits if you use just one or two of the above sites. If so, be prepared to use all of them and widen your search area to neighbouring towns, large urban centres, and even other provinces and countries. Even if you aren't seriously considering moving for a job—if your strategy is just to wait until relevant jobs arise closer to home—at least getting a sense of what's out there elsewhere is an important exercise for now. Beyond the above sites, also seek out the following:

- Job search engines specific to your sector or field
- Professional association sites specific to your field
- Company/organization websites (look for their Careers page)
- Professional networking sites such as LinkedIn and Facebook

Your goal is to collect as many job leads as possible to a get a full sense of what's available before focusing on those worth devoting significant time to.

Once you've collected some job postings for positions you can pursue seriously, your next step is to compile a set of notes that will furnish all the necessary information for a cover letter and résumé. For each position you find a posting for, list the following:

1. Job title exactly as given in the job posting

- Use this in the subject line for both your cover letter and in the Objective statement in your résumé proper.
- Also copy and paste the reference number if the position has one. Larger organizations that have a dedicated human resources (HR) department will catalogue their hiring competitions, so giving the reference number for the position you're applying for provides the organization with the information they need to process your application properly. That will put you in their good graces.

2. Required skills, competencies, and qualifications

- Every job posting worth applying to lists skills the employer is looking for in the ideal employee for that position. These may also take the form of job duties. Copy and paste these into your notes to ensure accuracy of transcription.
- Use this list as a guide for what to include in the Skills and Qualifications Summary section of your résumé, as well as under entries in the Employment and/or Education sections as proof that you've developed the skills the employer requires of applicants. If the employer or their third-party recruiter agents use an electronic filter to dispose of applications that don't match enough of the key words present in the posting, basing your résumé on the posting's list of skills will increase your chances of success. Copy the exact wording.

- Don't let the fact that you don't have everything the employer asks for be a reason to shoot yourself down for them. Some employers may ask for too much when listing required educational credentials and experience to see if the unicorn they seek actually exists. If not, they'll select from among the next-best applicants. If you have reasonably equivalent experience or potential instead of the exact credential required by the employer, find opportunities in your résumé, cover letter, and interview to explain how you can nonetheless deliver on what they want.

3. Company name, mailing address, and website

- Find the mailing address on the company website's Contact page
- Use the company name in your targeted résumé's Objective statement and both the name and mailing address in your cover letter. This will clarify to the hiring manager that your application is specific to the location where you intend to work.
- Use the website to research the company.

4. Company background

- Search the company website, especially its *About Us* page, for basic details about its size, history, and mission or vision statement.
- Extend this research to an online search for news about the company beyond what they present themselves. Look especially for recent news items that might offer clues as to why they're hiring and what problems they need to solve. Knowing this informs how you persuasively pitch yourself as part of the solution to those problems.
- Use this information to inform your cover letter and prepare your interview talking points. Paraphrasing the employer's mission or vision statement to make it your own in both the cover letter and interview will help convince the employer that your priorities align with theirs and you'll fit the company culture.

5. Services and products

- Sketch out a list of the company's products and/or services; if these number in the dozens, hundreds, or thousands, just give some major categories relevant to the job you'd do for them.
- Use this knowledge to prepare for parts of the cover letter and interview.

6. Clientele

- Identify demographic and other information about the company's customer base or clientele. Since the first rule of business is to know the customer, what they want, and how to provide it, proving your understanding of these will help convince the employer that you share their priorities.
- Use this to prepare your cover letter and for your interview.

7. Hiring manager name and contact information

- When the manager responsible for filling a position sees their name as the addressee in the cover letter, this usually reflects well on the applicant. As opposed to addressing the letter generically "To whom it may concern," the targeted cover letter shows that the applicant is resourceful in discovering who exactly to direct their pitch to and would be similarly resourceful in networking on the company's behalf in the position they're applying to.
- Search out the company Contact and About pages to determine who would likely be in charge of hiring.
    - Some job postings will name whom to send applications to, in which case this is easy, but usually you have to dig for this, perhaps using LinkedIn.
    - If it's a larger company, look for head personnel in HR (human resources), recruiting, or operations.
    - If it's a small business, the hiring manager is more likely to be the CEO, director, or owner.
- If this information is not available on the job posting and you can't find it on the website, try calling the company and ask to whom you can address your cover letter for the job application (Guffey et al., 2016, p. 398).
    - Calling the company shows that you are proactive and resourceful in getting the information necessary to succeed, shows that you care about what the company wants, and is a good networking play.
    - Calling also provides you with an opportunity to ask about their preferences for cover letters (do they want them or not?) and résumés (one page or two? reverse-chronological, functional, or combination résumé? what else do they like to see in them?) so you can tailor yours accordingly.
    - If they refuse to divulge this information, respect that they want to protect the identity of the hiring manager so that applicants can't influenced them outside of the standard hiring process. If this is the case, "Dear Hiring Manager" is an acceptable alternative salutation in the cover letter.
- Use this information for your cover letter and preparing for your interview; also consider if this person is worth working for by examining their LinkedIn profile and whatever else you can find online. After all, a hiring process is a two-way street where both employer and applicant assess each other for compatibility.

8. Job posting URL and screenshot

- Copy and paste the web address (URL) for the job posting into your notes and, to retrieve it easily, hyperlink the address by positioning your cursor at the end of it and hitting the spacebar (or highlight, type ctrl + k, and paste in the URL into the web address field).
- Just to keep a record of the job posting for future reference, especially if the posting is taken down after the application window expires and you need to review it ahead of the interview, insert a screenshot (Take-a-screenshot.org, 2014) of the job posting below the URL. You may need two or three screenshots to cover the full scroll-down length of the posting webpage.

Making a habit of keeping such a record of the jobs you're serious about and that you have a good chance of hearing back from will set you up for success. Applications that don't address what the posting asks for because the applicant didn't strategically note what that was, however, will likely be disposed of electronically before a human even sets eyes on them.

Traditional Job Search Techniques

Despite the convenience of online job searches and applications, they aren't nearly as effective on their own as traditional in-person networking. Much of the daily operations of a business involve employees being present in a workplace or going into the field and working with or for others, not secluded entirely in a technology bubble. With its emphasis on soft skills, only traditional networking can give employers the convincing first impression that a job candidate would be productive in such interactions. Since the majority of hiring happens as the result of networking in its various forms, begin cultivating a professional network in the following ways:

1. Be friendly, outgoing, and supportive of your peers in your college classes. Though it's partly true that you'll be competing with your classmates for jobs when you graduate, you may also rely on them for recruiting opportunities. Say a classmate you know quite well landed their dream job with a reputable company soon after graduation. Six months later, that company is hiring again. Who's going to alert you to the opportunity? Who's going to coach you on what the employer prefers to see in résumés, cover letters, and interviews? Who's going to put in a good word for you with the hiring manager? If you can count on an inside friend or colleague being supportive because they are familiar with you and know you will perform well in that position, your path into that job is so much easier than without that guide.

If you spend your college years passing through like a ghost, however, focusing exclusively on your academic performance and shunning all social activities, you will miss valuable opportunities to connect with the people that may be your coworkers and even managers in your future workplaces. If they are in positions to help you but recall that you just kept to yourself in your old college days, they probably won't want to recommend you to the company because they recognize that your lone-wolf attitude will set you up to fail in that organization.

2. Ask your instructors and program coordinators for advice. Some instructors and program coordinators are highly invested in the success of their students and are eager to recommend them to their industry contacts as a way of assisting their recruitment efforts. This only works, however, if the student has the courage to ask for those connections and recommendations.

3. Attend industry conferences and network with participants. Joining a professional association and attending its meetings and conferences will give you ample opportunities to network with employers and their recruiting agents. As in the previous scenarios, this only works if you are friendly and outgoing. Conference participants who merely soak in others' presentations and discussions without networking are effectively invisible to the recruiters.

4. Attend career fairs and sign up for interviews with visiting recruiters. Colleges have tight connections with industry partners because they are a greenhouse for the emerging labour pool. When company recruiters come around, be there to ask them about the opportunities they bring. Recruiters aren't interested in students who aren't interested in them. Attending career fairs and talking to recruiters is a great way of showing interest. (Guffey, Loewy, & Almonte, 2016, pp. 383)

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

1. Use some of the job search engines listed in this unit to explore what job positions are available upon graduation. Identify the required skills and qualifications that you will need.

References

Guffey, M., Loewy, D, & Almonte, R. (2016). *Essentials of business communication* (8th Can. ed.). Toronto: Nelson.

Take-a-screenshot.org. (2014, July 18). How do I take a screenshot? Retrieved from https://www.take-a-screenshot.org/

Unit #29: Resumes and Online Applications

Learning Objectives

1. Represent skills, knowledge, and experience realistically for employment purposes.
2. Prepare a customized resume.

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.

Can you get to an interview without it? Sometimes a small-business owner will sidestep usual human resources (HR) best practices and hire without placing too much emphasis (if any) on the résumé. In most cases, however, the résumé is key to the hiring process. Sometimes one writing mistake—even just one little typo (LedgerLink, 2009)—can fail you out of the running so you don't proceed to the oral component (the interview). Employers demand perfection in the résumé for the following reasons:

1. Enough applicants set the quality bar high by delivering a flawless résumé. When the hiring manager's task is to whittle down a pile of a hundred applications to about five for interviews, even one writing mistake in a résumé gives them the reason they're looking for to dump the résumé in the shredder, thinning out the pile a little further. They might even feel vindictive about it because a résumé riddled with errors is insulting; it says to the employer: "I'm not bothering to fix up my résumé because you're not worth my time." This is why writing errors often rank as hiring managers' #1 pet peeve (Vandegriend, 2017). If 90% of résumés have errors and can be shredded upon first sight of one, the hiring manager's job of sorting through a hundred applications then becomes selecting the five most qualified from among the ten flawless ones remaining after the quality-of-writing cull.
2. A perfect résumé speaks volumes about how conscientious a job applicant can be about the quality of work they do. If a résumé is poorly written, the employer can safely expect a similarly poor quality of work if the applicant became an employee. That may be untrue and unfair, but the employer has nothing else to go on besides this document and the cover letter to make a snap judgment about whether the applicant would be suitable in the position. A perfect résumé shows that the applicant cares about what the employer wants, knows how to deliver it, and could potentially continue to do the same if hired.

Employer expectations are high and rising. Gone are the days where a printed résumé was all you were responsible for. Today you must also project a professional image online in whatever employers find when they Google-search you—because they almost certainly will. Even your electronically submitted résumé must be written with a consideration of the electronic filters employers use to scan applications and pre-select only those that truly answer the job posting's call. This chapter section will help you increase your chances of getting to interview for the job you've been training so hard for by writing a résumé that meets employer expectations.

Generic Résumés

Since 93% of employers Google-search job applicants to see how they present themselves in social media differently from their application (Jobvite, 2014, p. 10), a two-pronged approach to professionalizing your web presence is absolutely necessary. First, remove anything that makes you look unprofessional. Adjust your privacy settings to minimize your personal presence in public searches. In Facebook and Instagram, for instance, this means setting your entire profile to private (available only to friends) except what the sites force you to make public. Since over half of recruiters have reconsidered a candidate based on what they see on social media (Jobvite, 2014, p. 11), your publicly available profile picture, for instance, should be a decent headshot rather than a beach-party pic of you guzzling beer in a revealing swimsuit.

Second, professionalize your social media presence by actively posting career-oriented content that will be the first "hit" employers see when they Google-search you. When this content takes the form of a résumé, it's a "passive" one in that you put out a generic version for people to find rather than a targeted one in response to a job posting. In combination, passive and targeted résumés can be a winning combination. On its own, however, a passive generic résumé is useless. Consider the following strategies for how to win an interview with a combined approach to résumé building.

Generic Résumé Topics

An Effective Passive Generic Résumé: Your LinkedIn Profile

If you haven't done this yet, professionalize your web presence by assembling a well-developed LinkedIn profile. The site and others offer plenty of advice on how to make the most of the social media platform, so search a few out to get a picture of the consensus on what makes for a successful profile. A good, current place to start is The Most Effective Ways to Use LinkedIn (Doyle, 2018) because it links you to several in-depth guides for building each aspect of your profile.

If you've done this already, show potential employers that you're fully committed to your profession by continually updating your profile as the site adds and develops features. Keep building your network and adding content related to your field. Show that you engage in professional activities online because you're a motivated professional rather than toss a profile together as a one-time exercise because someone told you to.

As you gain more professional experience throughout your career, add it all to your LinkedIn profile to make it a master CV ("curriculum vitae," meaning "course of life" in Latin) from which you can extract targeted résumés for particular job applications. It's okay if your targeted résumé and CV cover the exact same content in the beginning of your working life because you won't have much to put in either; employers will understand that when they see the year you graduated from college. As you gain more experience and can be picky about what you include in a targeted résumé, however, your LinkedIn CV will provide employers with a fuller picture of what you've been doing with your life. They will be impressed that (1) you were able to present to them a slice of that history relevant to the job at hand, and that (2) you're so much more well-rounded than your targeted résumé lets on. They'll see that you have depth.

What's Wrong Sending a Generic Résumé? —It's Spam

To be competitive in any fierce job competition, a generic résumé—i.e., the kind that you made a hundred copies of to get your first job and handed out to every shop on the street that had a "Help Wanted" sign in the window—just isn't going to cut it. Indeed, it ranks among the top 10 pet peeves of hiring managers (Vandegriend, 2017) because, like spam, generic résumés just give the busy hiring manager more useless junk to sort through. Even a well-developed passive résumé like a LinkedIn profile isn't enough on its own. (Don't be surprised if your LinkedIn message inbox isn't flooded with job offers if you do nothing other than post your profile.)

To have any chance of succeeding in this game, actively apply to job postings and make your applications stand out with superior quality, knowing that your application will be just one of dozens, perhaps even hundreds, vying for interview spots. When an employer goes through the pile of applications that make it past the electronic filters, the résumés targeted specifically at that job make the generic ones look like they showed up to a gunfight with pocketknives. Along with those marred by glaring errors, generic résumés are the first to go into the shredder. They annoy hiring managers because they mean more work, but they're easy to spot and reject when the goal is to thin out the pile.

Can you land a job with a generic résumé alone? If you're somehow what a small business without dedicated HR personnel is looking for regardless of what your résumé says, sure, you can get that job mostly by networking your way into it. If you're up against some serious competition in a strict, application-based hiring process driven by sound HR practices that seek to eliminate bias, however, anything less than a targeted résumé doesn't stand a chance. What is a targeted résumé, then?

Customized Resume Parts

A Customized résumé is the result of the job applicant tailoring their résumé to present nothing more or less than what the job posting asks for. An employer's job posting is a wish-list of all the skills and qualifications that would set up the applicant for success in the position advertised. It also informs the selection criteria the employer applies to every job application. This way, every application is measured objectively for how well it reflects what the job posting asked for, as well as how current and well-presented it is. The employer expects that each section will prove that the applicant is perfect for the job, as well as meet general expectations for quality of writing—clarity, conciseness, correctness, and accuracy—as well as document readability and organization.

You have three options for types of résumé based on your situation and what the employer wants, each defined by how they organize the content:

1. **Reverse-chronological** résumé: For each experience section (Education, Employment, and Related), this résumé lists your professional activities starting with the present or latest (most recent) at the top and your first (oldest) at the bottom. A key feature is a column with date ranges in months and years beside each educational program, job, and relevant activity you've done. This presents the hiring manager with a snapshot of where you're at right now in your professional development, how you got there, and where you came from.

Reverse-chronological résumés can be revealing in ways that might not cast you in an entirely positive light. Exclusively short-term employment and significant gaps in your work and educational history will raise red flags (Vandegriend, 2017). These will make the reader wonder (1) why you're not able to keep a job for long (are you chronically unsatisfied in your work? incompetent? unlikeable?) and (2) what you were doing in those gaps. Were you in jail? Unemployed and playing video games in your parents' basement all day? None of these characteristics and scenarios are appealing to employers. Luckily, there are alternative ways of organizing a résumé.

2. **Functional** (a.k.a. competency- or skills-based) résumé: Rather than organize the résumé around experience sections measured out in months and years, the functional résumé makes important skills the subheadings. The bullet points that follow explain in more detail what each skill entails, how it was acquired through training or education, and how it was practiced and applied professionally. The functional résumé is ideal if you have questionable gaps or durations in your employment or educational history because it omits or de-emphasizes date ranges.

3. **Combination** functional and reverse-chronological résumé: This is the most popular form and the basis for the guide on targeted résumé parts given below. It uses the reverse-chronological format for the standard experience sections showcasing the applicant's educational and employment history but adds a Skills and Qualifications Summary at the beginning to highlight the applicant's abilities and credentials that match what the job posting asked for.

Some employers have strong preferences for one résumé type. Helpful employers will specify which they prefer in the job posting. If not, however, your only recourse is to contact the company and ask what their preferences are. Rather than cheating, this shows that you care enough about meeting employer expectations to be proactive on the communication front. Employers hope you'll do the same as an employee—as opposed to guessing at expectations and potentially wasting your time and effort, as well as company money, doing something no one wants. Let's look in detail at how you can make your résumé meet common (but not necessarily all) employer expectations in all parts of a combination reverse-chronological/ functional targeted résumé.

Personal Information Header

The personal information header appears at the top of the document because its most important piece, your name, is your document's title, not "Résumé." Use your full legal name so that, if you're the leading candidate, it will make the employer's job of due-diligence background checks (e.g., police record checks, checking academic transcripts for proof of credentials, etc.) easier. (If you go by a nickname, you can certainly state your preferences after you get the job.) Also use a larger font size, bold typeface, and even colour to make your name stand out from the rest of the text. Don't make it so large that it looks like you have an out-of-this-world ego, however; a 15-point font, compared with the 11- or 12-point font you use for the rest of the text, is perfect.

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613-727-4723 (c) — www.linkedin.com/in/imonthajobhun

Figure 9.2.2.1: Sample Personal Information Header

Below or beside your name, add your contact information, including your physical mailing address, phone number, and email address. If you have multiple addresses and phone numbers, use only those that the employer can best reach you with. Use a one-line address in the following format:

[Street #] [Street Name] [Street Type], [City or Town], [Provincial Abbreviation] [two spaces] [POSTAL CODE]

- Add "Canada" at the end only if you're applying internationally.
- Fully spell out the street type rather than abbreviate it (e.g., Avenue, not Ave.) to strike a formal tone.
- Separate the provincial abbreviation from the postal code with two spaces, not a comma.
- Place a space in the middle of the six-character alpha-numeric postal code.
- Use commas only before and after the city or town.

Whatever phone number you give, ensure that the personalized message that a caller hears if they're sent to voicemail is a professional one.

Use a standard email address like yourfirstname.lastname@emailprovider.com or your college email address to prove you went to the school given in your résumé's Education section. Don't use an unprofessional email address like cray-cray.tay-tay@yahoo.com or macdaddy.playa@hotmail.com; that email address is fine for using with close friends who share your sense of humour but not with an employer. Also, don't use your work email address unless your current employer is okay with you using it to look for work elsewhere since they'll have access to those emails. Finally, space permitting, include a personal website such as a link to your LinkedIn profile and/or online portfolio. Make it easy for hiring managers to find whatever else you want them to see of you online besides what they search out themselves.

Don't overload your personal information header with inappropriate or too much information, however.

To avoid inviting various types of bias into the selection process or information that might be exploited, never include the following details:

- Your **Social Insurance Number** (SIN): Give this to the employer only when you've accepted a job offer and they require your SIN for payroll processing.
- Your **age**: Don't give employers a reason to make biased assumptions about the quality of work you'll do based on your age. Some employers consider employers who are too young or too old to be liabilities. You want to at least plead your case in an interview rather than be discriminated against during application selection.
- Your **ethnicity** or place of origin: The employer will inevitably make certain assumptions—positive or negative—based on what your full name says about your ethnicity, but the personal information header isn't the place for you to say anything about it either way. Many organizations have an affirmative-action clause that gives special consideration to applicants who are traditionally underrepresented in the workforce. Only indicate your ethnicity or sex if an online application questionnaire asks if you identify as a minority.
- Your **sexual orientation**: If this matters at all (99.9% of the time it doesn't), it's something you can discuss during the interview if you want.
- Any disability: To prevent inviting ability bias into the employer's assessment of your employability, leave out any mention of disabilities or health conditions.
- Your **picture**: Unless it's an industry expectation, such as in the entertainment business, your physical appearance shouldn't matter at this stage—only your words. Avoid inviting lookism bias into the selection process. The employer can always look you up on social media; otherwise, they will see you at the interview.

Putting it all together, your personal information header should be only two-to-three lines on the page and placed in the document header so that it goes automatically on every page and leaves more room below. Spreading that information out across the header is a more efficient use of space than stacking each piece of information to make a five- or six-line block. To look fresh, some résumé templates place the information in a column in the margin or even near the bottom. This may backfire because, if most employers expect to see that information at the top and don't see it at first glance, they might discard the application thinking the applicant simply forgot to put it there. No matter how good a résumé is, there's no point reading on if the applicant can't be contacted. Stacking your personal information on the side may be okay for someone with a one-page résumé that lacks depth of experience, but any résumé that goes onto a second page should have the that information in the header so it appears uniformly at the top of every page.

Objective Statement

When the Objective statement mentions the company and position in question, it's the first sign confirming to the employer that this résumé is targeted. Like someone on a date who makes the other feel special by saying that they're interested only in them, the Objective statement singles out the employer as the applicant's priority. Whereas a generic résumé may call this "Career Objective" and declare a long-term career goal, a targeted résumé's Objective statement focuses on what exactly the applicant can do for the employer. Convention requires that this be a one-line infinitive-verb statement that helps the employer understand that your priority is to help them achieve their business goals. Not a complete sentence, an infinitive verb phrase begins with "To" and follows with a present-tense first-person verb.

OBJECTIVE

To contribute to an increase in sales at Company XYZ as a top sales representative.

Skills and Qualifications Summary

The Skills and Qualifications Summary section follows the Objective because of its importance in declaring in one neat package the major skills and qualifications that match those in the job posting. In a combination résumé, it's the feature borrowed from the functional résumé type. If the job ad lists four main skills—let's call them skills "ABCD"—the candidates who list skills ABCD in this section will have the best chance of getting an interview because they frontload their résumé with all the top-priority items the employer seeks. Doing this shows you can follow instructions and says to the employer, "I read your job posting and am confident that I'm what you're looking for."

If you have skills ABC and omitted D even though you have that skill, you could lose the competition for interview spots to those who were conscientious enough to add it to the list. If you have skills ABCDEFG, adding EFG will appear to be a résumé-padding distraction. You can put EFG in your CV on LinkedIn but listing only ABCD here makes this a truly targeted résumé. If you have ABC but adding D would be dishonest because you don't have that skill, just go with ABC; don't let the fact that you don't have everything the employer is looking for stop you from applying. If you shoot yourself down for every job application because you have only about 80% of what they're looking for, you will self-sabotage yourself out of almost every employment opportunity. Apply anyway because the employer may have asked for too much and will find that no applicant has ABCD, which means they'll shortlist candidates with three out of four.

Your Skills and Qualifications Summary section helps you pass the filter that many employers use to scan electronically submitted applications to ensure they've used enough of the job posting's key words. Filtering out applicants merely taking shots in the dark gives the busy hiring manager more time to focus on those who truly qualify. Don't worry about this being plagiarism. If your application fails to mirror exactly the key terms listed throughout the job posting, the employer might not even see yours.

Dividing the Skills and Qualifications Summary into sub-lists related to categories of the job will increase your chances of meeting the employer's approval. To use this highly prized real estate on the page effectively, consider arranging the sub-lists in three columns; a couple could be for job-specific technical skill sets, another for transferrable soft skills. Make a three-cell, single-row, borderless table from MS Word's Insert menu with a centred bold heading and bulleted list of skills in each cell. Only do this, however, if you're sure that your application formatting won't be electronically filtered out. Some of the online application services offered through job search engines such as Indeed will convert résumés into scannable formats, often scrambling text into an unreadable mess. Converters are the bane of applicants who spend time carefully formatting for readability and space efficiency (TERRIBLE Resume Converter, n.d.).

Begin with a short paragraph of noun phrases (not complete sentences) profiling where you are in your career with relevant credentials.

SKILLS AND QUALIFICATIONS SUMMARY

A recent graduate of the three-year Game Development Advanced Diploma at Algonquin College in Ottawa, Ontario. A video game developer specializing in programming and project management but with additional proficiencies in level design and asset modeling, as well as competence in user interface design.

Programming Language	Software	Interpersonal
• 3 years' advanced proficiency in C++ • 2 years' intermediate use of C# • 1 year of familiarity with OpenGL	• 3 years' advanced proficiency with 3ds Max • 5 years' functional proficiency with Photoshop • 2 years' familiarity with Java	• Excellent leadership and teamwork skills • Advanced writing and presentation skills • Fully bilingual (reading, writing, speaking) in English and French

Education

Whether your Education section or Employment Experience section immediately follows your Skills and Qualifications Summary section depends on which is more relevant to the job you're applying to. If you're applying to a job that directly relates to the college program you've just graduated from, then you want the employer to see that before your work history because it's more recent and relevant. The order of information matters because the hiring manager is scanning each résumé quickly to get through the pile of applications. They make quick judgments about which to discard and which to consider for an interview. If the Employment section precedes the Education section but has jobs unrelated to the position in question, it's a strike against the application.

List your education in reverse-chronological order with the program title and credential type as your bold subheading followed by the institution and its location in plain style either on the same line or on the line below. The program title precedes the institution because it's more relevant in proving that you've trained for the job at hand. Give the date range in months and years near the margin. If you're still in the program, put "Present" or your expected graduation date—e.g., "April 2020 (expected)."

EDUCATION

Game Development Advanced Diploma Algonquin College, Ottawa ON	Sept. 2015 – Apr. 2018

- Overall GPA of 3.97 in courses including Programming Fundamentals, Game Algorithms, Graphics Computations, Assets, Level Design, Scripting, Project Management, and Communications
- Gameplay programming in C++, C#, Java, OpenGL, Unity, and Unreal
- Asset design and animation using 3ds Max, Substance Painter, and Photoshop
- Collaborated in the production of a fully functioning FPS video game

Pre-Animation and Illustration Certificate Algonquin College, Ottawa ON	Sept. 2014 – Apr. 2015

In the sub-points under the program title subheading, include your overall grade-point average (GPA) if it's above 3.5 on a 4-point scale (high-A average), which proves to employers that you've had a strong work ethic throughout your training when you have more industry-relevant training than work experience. Be honest because the employer may request an official college transcript, and any discrepancy between the numbers there and on your résumé will end your candidacy. Drop the GPA line when you have 3-5 years of successful work experience in the same type of job you apply to.

In the list of subpoints, include course titles that prove how you learned the skills identified in the job posting and in your Summary section. If the titles alone don't have the same wording as those sought-after skills, include further points that do. The wording is vital because your application can be electronically filtered out if it doesn't contain enough matching key terms in the job posting. Once a human reads the résumé and they're not convinced you've proved where you learned, practiced, and applied the skills they're looking for, they may deprioritize and ultimately reject your application. When you have enough industry-relevant work experience (e.g., 5-10 years) for the jobs you apply to, you can shift the skills learned in your training to go instead under the jobs you've actually done, leaving your Education section as simply a list of credentials.

Omit your high school in the list of educational experience. Even if you recently graduated, to an employer it's redundant padding because being in a college program proves that you completed high school. Also, showing when you graduated gives away your age, which may introduce some age-based discrimination into the selection process. If you want to list participation in high-school clubs related to your field of study, do it in the Related Experience section.

Add other programs you've completed, even if they're not directly relevant to the job, just to show what you've been doing with your time. If they didn't provide you with any skills matching those in the job posting, omit sub-points under them. If you didn't finish a program, including it depends on whether it provided you with any skills that match those in the posting. If so, add it. If not, leave it out. When employers check your LinkedIn profile, they'll understand that you omitted an unfinished program from your targeted résumé because it didn't relate enough to the job at hand.

Employment Experience

The Employment Experience section follows the same format as the Education section, only with the job title as the subheading in bold followed by the company name and location in plain style. List your jobs in reverse-chronological order with your current (or most recent) job first and your earliest last. List the month/year date ranges in the same position as in the Education section. The months are important because a date range such as "2015-2016" is misleading if you worked a few weeks before and after New Year's, whereas "Dec. 2015 – Jan. 2016" honestly indicates seasonal work.

EMPLOYMENT EXPERIENCE

Student Support Representative, Student Support Services The AC Hub, Algonquin College, Ottawa ON	Apr. 2016 – Present

- Provide effective customer service in supporting student and faculty clientele

Sandwich Artist, Person in Charge, Subway Rideau Centre Food Court, Ottawa ON	Jul. 2014 – Apr. 2016

- Managed staff and conducted quality-control inspections
- Ensured customer service satisfaction through direct interaction and team motivation
- Fostered effective teamwork among staff by role-modeling and conflict resolution

At the beginning of your working life, include whatever jobs you've done (except perhaps newspaper or flyer delivery) but make them relevant by adding transferrable skills as subpoints underneath. While you should omit task-specific skills (e.g., in Figure 9.2.2.5 above, there's no mention of food preparation), definitely list transferrable skills (e.g., teamwork) that match those listed in the job posting. As you can also see in Figure 9.2.2.5, each bullet-point skill begins with an action verb for consistent parallelism, the verb for the present job is in the present tense, and those for the past job are consistently past-tense verbs. Use clear, high-impact action verbs such as the following:

Achieved	Coordinated	Expanded	Innovated	Provided	Served
Analyzed	Corrected	Expedited	Introduced	Reduced	Spearheaded
Approved	Delegated	Facilitated	Investigated	Represented	Spurred
Averaged	Designed	Grew	Managed	Resolved	Streamlined
Collaborated	Directed	Implemented	Organized	Restructured	Strengthened
Constructed	Enabled	Improved	Overhauled	Reviewed	Supervised
Contributed	Engineered	Increased	Pioneered	Revitalized	Targeted
Converted	Established	Initiated	Prioritized	Screened	Transformed

Fleshed out into bullet-point descriptions of skills in a three-part ***verb + object + prepositional phrase*** structure, some of the above action verbs may look like the following:

- **Collaborated** with team members consistently in working groups improving departmental processes
- **Streamlined** collaborative report-writing processes by switching to Google Docs
- **Organized** annual awards dinner celebration for a department of 150 employees
- **Designed** 13 internal feedback forms in the company intranet for multiple departments
- **Secured** government program funding successfully for eight departmental initiatives

Notice that the writer focuses on quantifiable achievements with actual numerical figures and places adverbs after the verb rather than begin points with them (e.g., not *Consistently collaborated with team members*) so that you always lead with verbs (Guffey, Loewy, & Almonte, 2016, p. 387). To make your accomplishments more concrete, Google executive Laszlo Block advises you to structure them according to the following formula:

Accomplished X as measured by Y by doing Z

Even if your job is just a grocery store cashier, you can quantify your achievements and put them in perspective. Instead of "Processed customer purchases at the checkout," saying "Served 85 customers per day with 100% accuracy compared to my peers' average of 70 customers at 90% accuracy" demonstrates your focus on achieving outstanding excellence with regard to KPIs (key performance indicators), which hiring managers will love (Block, 2014).

As you add more industry-specific work experience throughout your career, you can move those transferrable skills to go under only career-oriented entries in this section and delete non-industry-related work experience. For instance, you would delete food service industry jobs such as Subway if your career isn't culinary in nature. A decade or two into your working life, you'll have a solid record of only career-oriented work experience in résumés targeted to career employers.

The gold standard of experience that employers want to see in a résumé is that you've previously done the job you're applying for—just for another employer (Vandegriend, 2017). This means that you can carry on in the new position with minimal training. If that's the case, you certainly want to place your Employment Experience section above your Education section. Otherwise, recent college graduates should lead with their more relevant Education section, appealing to employers hiring for potential rather than for experience, until they get that industry work experience.

Related Experience

The Related Experience section gives you a chance to match any of the skills listed in the job posting that you haven't yet matched in either of the Education or Employment Experience sections. It also helps prove that you're a well-rounded candidate who has developed the soft skills that employers value. (Merely listing such skills in the Qualifications Summary is suspicious unless you later list experiences that suggest you developed them in a formal way. Without the proof, the employer may just think that you've copied a list of soft skills off a generic résumé model.) The Related Experience section is organized in the same manner as the other two experience sections above it, using subheadings for categories such as the following:

- Volunteer activities
- Unpaid work experience such as internships
- Certifications
- Memberships in professional associations or community organizations
- Honours and awards
- Extracurricular activities

Beneath each subheading, list specifics (e.g. First Aid and WHMIS as bullet points under Certifications). Omit mere hobbies and interests but include league sports if the job posting included teamwork skills as a requirement and you match that in the bullet point beneath the entry. Use a single month-year combination for one-time events and date ranges for longer-duration activities. Drop the least relevant from targeted résumés as you gain experience over the years while keeping them in your LinkedIn profile.

References

There is no need to list "**References available upon request**" in your resume as it is assumed that you will provide references if they are requested. If you are invited for an interview then you do need to think about who you would use as references and contact them in advance. Three or four references is best, and each must be someone who was in a position of authority over you, such as a manager or supervisor, for at least two years, ideally. One of your references can also be an academic reference.

Provide a list of your references in order of what you expect to be the most enthusiastic endorsement down to the least. Do not include coworkers, friends, or family members among your references. If your parents or relatives were your employers (e.g., in the family business), include them as references only if they're your only work experience. As soon as you have enough non-family work experience, drop your parents or relatives from the list. An employer seeing endorsements from people with the same last name might assume that they'll be biased to the point of being useless as references.

Each reference must contain the following pieces of information:

1. **Full name in bold,** followed by a comma and the reference's official job title capitalized (e.g., Manager, Supervisor, CEO, or Franchise Owner)
2. **Company** or organization they represent (or represented when you worked under them, though they've since moved on to another company) in plain style. It's important to give the name of the company so that the reader can connect it to your Employment Experience section. If you worked for a company but don't have a reference for it, the reader might suspect that you did so poor a job that the employer refused to give you a strong reference. This is why you should always do your best work in any job; even if you don't enjoy the work, doing your best increases your chances of getting a good reference that you can use as your ticket to a better job.
3. **Phone number**. Employers checking references prefer to call, rather than email, so they can have a quick back-and-forth conversation about the candidate. The caller will rely on important clues such as voice tones for assessing the honesty of the reference's endorsement, which wouldn't be possible in a non-verbal email.
4. **Email address**. This is only for the potential employer to set up a time for a phone call with the reference or to ask for details in writing if a phone call is somehow difficult or impossible (e.g., time-zone differences or international calling charges). Consider, however, that managers or supervisors might hesitate from endorsing anyone in writing, which is why the telephone is the preferred channel here.

It's very important that you confirm with your references that they will provide you with a *strong* endorsement (use those words when you ask) if called upon by a potential employer. Don't be afraid to ask. Providing references is part of a manager's or supervisor's job. They got to where they are on the strength of their former employers' references, and there's a "pay it forward" principle motivating them to do the same for the employees under them. If they don't believe in your potential, they'll likely be honest in advising you to ask someone else.

Résumé Formatting and Submission

When all your content is in place, ensure that your résumé is impeccably organized, revised, and proofread. According to one study surveying hiring managers, the top three deal-breaker reasons for rejecting a résumé are the following:

1. Spelling or grammar errors
2. Lack of customization
3. Disorganization (Vandegriend, 2017)

Since even one typo can ruin your chances of being selected for an interview (LedgerLink, 2009), no documents you've ever written in your life should be as thoroughly revised and proofread as your résumé and cover letter.

One Page or Two?

A common employer expectation requires you to fit all of your details on one page. If this means cutting details that might convince an employer to invite you to an interview, then only do this if you're sure that an employer will discard your résumé if it goes over a page. If you see "Send your one-page résumé" on the posting, that's your cue for the required length. Even if an employer isn't so strict, any details that spill onto the second page will, according to the Law of Diminishing Returns, work against you if they don't effectively convince the employer to invite you to an interview. The busy hiring manager speed-reading through dozens or hundreds of applications will be annoyed by any time-wasting padding in a résumé, and the slightest annoyance is enough to prompt them to dump your application in the shredder.

Format for Ease of Readability

Ensure that your résumé is easy to read in every way. Trying to fit everything on a single page by reducing the font size to 8-point and the margins to 1cm, as well as using multiple columns to fill every square centimeter of available white space, will just annoy the reader. They'll suspect that you'll be similarly disrespectful to your readers on the job, so they may simply shred your résumé after a mere glance at its formatting. Ensure especially that your:

- Text is a standard 11- or 12-pt. font type with sparing use of colour, all-caps, and bold typeface (just for headings and subheadings); avoid italics and underlining
- Margins are between 2.54cm (1 in.) and 3cm all around and empty on the sides

- Text and whitespace are balanced without leaving large gaps

Electronic, Scannable, and Hard-copy Submissions

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, go with 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. Avoiding 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 colour, 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 (albeit homely) version.
2. Use Indeed (or other search engines) to find job postings but send your well-formatted application directly to the company either via 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.

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 show respect, suggesting that the employer was worth the extra expense. Also, put an 8.5″ x 11″ cardboard backing in with your application when you mail it in a 9″ x 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 is a winning combination in the eyes of any hiring manager exhausted by the disappointing quality of the majority of applications.

Key Takeaway

Customized 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.

Exercises

1. Review the information on resumes available at [Seneca Career Development for Students.]
2. Find inspiration for your resume by reviewing different resume templates that are available online.

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Unit #30: Cover Letters

Learning Objective

1. Prepare a persuasive cover letter.

Because the cover letter literally covers the résumé and is thus the first thing the hiring manager sees of you, it plays key role in convincing them to consider your application. Besides introducing the résumé and requesting an interview, the cover letter is a sales pitch explaining how you will benefit the company you're applying to. In the communications test that is the hiring process, it also proves that you can put coherent, persuasive sentences and paragraphs together when writing formally on the employer's behalf. The cover letter must be flawless because, like the résumé that follows it, even one writing error could be read as a sign of the poor quality of work to come and prompt the hiring manager to save time by shredding it immediately.

An important distinction in the content between the résumé and cover letter is that the former is focused on your past, the cover letter on your future with the company. Many job applicants wastefully use the cover letter to express in sentences what they listed in point-form in their résumé. To be persuasive, however, the cover letter must convince the employer that you will apply the skills and qualifications developed through previous work, education, and other experience to your future job. They want to see how you think you'll help meet their business goals and fit the company culture. If you answer the "What's in it for us if we hire you?" question that hiring managers direct towards any cover letter, you increase your chances of getting an interview.

Is a cover letter even necessary? In cases where you know that the employer thinks they're just a waste of time, then you can obviously skip it. Sometimes job postings will helpfully clarify whether they want a cover letter or not. What if they don't say either way, though? The safe bet is to write a cover letter as part of your targeted approach to the job application. It'll show the hiring manager that you've made the extra effort to explain how well you suit the job and give them more information to make a well-informed decision about you. Adding a cover letter looks better than all the applicants who didn't bother. We'll see below how the various parts of the cover letter can certainly help sway the hiring manager toward adding you to the interview shortlist.

Cover Letter Message Parts

As a direct-approach message, the cover letter generally follows the AIDA pattern of persuasive message in its four paragraphs:

A for **Attention**	States emphatically what job you want and that you qualify
I for **Interest**	Summarizes how you will apply your skills and qualifications
D for **Desire**	Explains why you're interested in the company and job itself
A for **Action**	Requests that the reader consider you for an interview

Let's look in more detail at how to write each of these four cover letter paragraphs plus surrounding parts.

Opening Salutation

The most impressive cover letters address the hiring manager formally by name in the opening salutation (Guffey et al., 2016, p. 398). "Dear Ms. Connie Jenkins:" tells the employer right away, "Take me seriously because I'm a targeted résumé" compared to the droves of applications introduced by generic cover letters beginning with "To whom it may concern:" or, worse, with no introductory cover letter at all. If the job posting said whom to address your application to, doing this gives you an early lead in the competition because it shows that you can follow orders, which not everyone does.

If the job posting made no mention of who the hiring manager is, finding their name also shows that you're resourceful and conscientious because you care about finding the right person to deal with—qualities employers love. You may have to dig for that information on the company website or by Google-searching for the company's HR or recruiting personnel and confirming that you have the right people using LinkedIn page results. However, you can't be sure that you have the right person this way, and naming the wrong person could backfire.

Perhaps the best strategy is just to call the company or even pay them a visit and ask to whom you can address your application. This is ideal because you can confirm the correct spelling and also ask for other employer preferences. Ask if a cover letter is necessary in the first place and what kind of résumé they prefer—reverse chronological, functional, or a combination. Doing this shows that you care about what the employer wants, which, by extension, suggests you'd do the same for the customers, managers, and co-workers you work for and with. It also gets your name on their radar. If the same person whom you talked to on the phone or met in person reads your application, you will have some valuable name recognition working for you.

If you discover instead that the company has hidden the hiring manager's identity too well, however, it's best to give up before getting too resourceful and looking like a hacker or stalker. Appreciate that many organizations prefer to keep the identity of the people responsible for hiring a mystery until the best job candidates meet them for the interview. This helps ensure an uninfluenced and unbiased hiring process. In such cases, "Dear Hiring Manager" is a perfectly acceptable opening salutation.

Opening Job Identification

If your cover letter responds to a job posting, its first paragraph should be a brief couple of sentences that do no more or less than the following:

1. State the official **job title** of the position you're seeking, as well as the reference number if one was provided in the job posting. Get right to the point by saying emphatically, "I am applying with great enthusiasm for the position of . . ." or "Please accept this application submitted with keen interest for the position of . . . ." Don't waste the reader's time with redundant lead-ins such as "I'm Todd Harper and I'm applying for . . ."; they can see your name at the top and/or bottom of the page.

If the job posting included a reference number, include it in parentheses after the job title. Also include it in the bolded **subject line** above along with the job title. Employers use job reference numbers to direct applications to the correct competition, especially if the company is large enough to run several at once. If you give the reference number, you'll show the reader that, in accommodating their bureaucratic needs, you are conscientious and considerate.

2. **Say where you found out about the job** in the first sentence after naming the job title. If you know someone in the company and they recommended that you apply, name-dropping works well here if they will give you a strong recommendation to the employer and their opinion matters. Even if you don't have an "in" from networking, say where you found the job posting or if a recruiter recommended it. Again, this shows that you are considerate in providing the employer information they're interested in. They will use this to determine where their job advertising money and efforts are being well directed. If most applicants say they found out about the job from a certain job search engine and not at all through another, then the employer will switch their focus to the popular job site and drop the other with the next competition (Guffey et al., 2016, pp. 398-399).

3. **State that you're qualified** for the position by asking the hiring manager to read onward. Be courteous in this request. A concluding sentence such as *Please consider the following application for details regarding how I meet the required qualifications for the position* nicely introduces the following paragraphs and résumé.

If your cover letter introduces an **unsolicited application**—i.e., it's a "cold call" prospecting for work rather than responding to a job posting—take a more indirect, persuasive approach than the direct one advised above. Start by asking if the employer is in need of someone who can do what you do, then detail the skills you have that will benefit the employer.

Skills and Qualifications Summary

Use your second paragraph to explain how you'll apply the skills you've learned and practiced throughout your educational, work, and other experience to benefit the employer in the position you're applying for. Getting right to the point with this in a solicited application (responding to a job posting) is vital because anything you include that doesn't instantly convince the employer that you have what they're looking for is going to sink your application quickly. Avoid the trap of simply repeating and stretching out the Skills and Qualifications Summary section of your résumé into full sentences.

Make the paragraph instead about how you're going to benefit the employer, using those skills to help the company achieve its business goals, which requires knowing and saying what they are. This is why you were advised to research the company at the outset of the application process and note their products and/or services, clientele demographics, and mission/vision statement. Show that you know what they want and have the necessary skills to deliver exactly that. If you convince the employer that you bring a skill set to the table that will set you up for success in the position right away (with only minimal mandatory training), you're a step closer to the interview. If you list skills that only partially mirror what the posting asks for (or, worse, not at all), however, you've moved your application a step closer to the shredder.

The biggest mistakes that job applicants make here is (1) simply summarizing their résumé with an repetitive *I did this*, *I did that*, I . . . , I . . . , I . . . structure and (2) saying how the job will benefit them (the applicant, not the employer) by advancing their career. What the reader takes away from this application-killing combination is that the candidate is a self-involved Millennial stereotype who might exploit the job for experience and then move on quickly to something better. That may be far from your true intentions, but that's just what it looks like to the reader who hasn't met you and has only your small writing sample to go on. Avoid **"I" dominance** by using activities and outcomes as the subjects of sentences rather than I (Guffey et al., 2016, p. 402). For example, saying "Working closely with clients to customize training programs that work best for them informed my customer-centred approach to fitness training" helps you escape the I-dominant phrasing of "I developed a customer-centred approach to fitness training by working closely with clients to customize their training programs."

Employer Preference

Though many applicants meet the required baseline qualifications for the job, only those who look like they will be a good "fit" in the company or organization culture will be invited for an interview. The paragraph that follows the qualifications paragraph is crucial to convincing the employer that you'll fit in nicely. To assure the employer you will be truly happy in that position, say what attracts you to it and to the company in general. Perhaps you have been a customer in the past and were really impressed by the product or service and the people you dealt with, and now you want to participate in the effort to make more satisfied customers like you've been. Saying that your priority is to make the company's customers and stakeholders happy, perhaps by paraphrasing the mission or vision statement available on their website and making it your own, goes a long way toward convincing the employer that you're their kind of people.

Closing Action Requests

End your letter's message concisely with two or three sentences that do the following:

1. **Thank the reader** for considering your application. Politely phrase this as a request to read on to the next page: *I very much appreciate your considering me for this position. Please review the attached résumé for a more detailed explanation of how I meet or exceed the required qualifications.*
2. **Request an interview.** Since winning an interview spot for a chance to get a job offer is the entire goal of the application, make your intentions clear by stating your desire to talk in person. You can say that you look forward to meeting and discussing further your "fit" in the organization, since that's exactly what they'll be doing with the interview. Though some cover letter writing guides advise ending with confidence, saying something like you'll be contacting them to arrange an interview or, worse, thanking them in advance for the job offer to come or asking when you can start the job will appear

entitled in the worst way. Any statement that assumes certain victory looks like you're saying that this opportunity is owed to you rather than earned. An important part of being courteous here at the letter's closing is being humble.

Cover Letter Editing and Submission

As with the résumé, where even one error can potentially sabotage all your efforts, the cover letter must be *perfect*. Put in the extra effort making it convincing and absolutely flawless. Enlist trusted others to review it also, ideally anyone you know in management positions.

Since most employers ask that you submit applications by email or by uploading them to a company website, following their instructions to the letter is essential. An error such as not naming your file exactly as the employer requests is enough to disqualify your application. If you're emailing it, is a cover letter still necessary or can you introduce your résumé in the email message itself? Given that people generally don't like long emails, even the few paragraphs that make up a cover letter can stretch a reader's patience if emailed. You also want the cover letter to prove that you can write formally. For these reasons, always write a cover letter for a job that you're serious about and attach it along with your résumé, either as a separate file or together with your résumé according to employer preference, when emailing or uploading your application.

Key Takeaway

Write a cover letter as part of your targeted approach to applying to job postings 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

1. Review the information on cover letters available at Seneca Career Development for Students.

References

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