# BUSINESS AND TECHNICAL COMMUNICATION

A GUIDE TO WRITING PROFESSIONALLY

00000,00 access code included

MARIBETH SCHLOBOHM

CHRISTOPHER RYAN

# BUSINESS AND TECHNICAL COMMUNICATION

A GUIDE TO WRITING PROFESSIONALLY

00000,00 access code included

MARIBETH SCHLOBOHM

CHRISTOPHER RYAN

Cover image © Shutterstock, Inc.

# Kendall Hunt

www.kendallhunt.com Send all inquiries to: 4050 Westmark Drive Dubuque, IA 52004-1840

Copyright © 2013, 2014 by Kendall Hunt Publishing Company Revised Printing: 2015

ISBN 978-1-4652-7632-2

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of the copyright owner.

Printed in the United States of America

# CONTENTS

About the Authors	XI
Foreword	xiii
Acknowledgements	xv
CHAPTER 1 Principles of Professional and Technical Communication	1
Style	2
Different from Other Forms of Writing	2
Research Orientation	2
Voice	3
Shifting Writing Orientation from Self to Audience	5
Designing for Easy Navigation	5
Structure	6
Introduction	6
Body Conclusion	6 6
Time and Space Limitations	7
Editing	8
Grammar	8
Etiquette	11
Ethics	12
Knowing and Doing Right versus Wrong	13
Giving Proper Attribution	13
Respecting Intellectual Property	14
Abiding by Employment Agreements	14
Honoring Noncompetition and Nondisclosure Agreements	15
Ensuring Safety and Security of Others	15
Conclusion	16
Candidate for a Pullet Surprise	18
CHAPTER 2 Audience	21
Purpose	22
Informing	22
Persuading	22
Types of Audiences	23
Decision Makers	23
Influencers	23
	iii

# iv ♦ CONTENTS

Those who need to know: End Users	24
Example Using All Audience Types	24
Overcoming Communication Barriers	25
Cultural Obstacles	26
Cross-Cultural Communication	27
Word Usage and Spelling	29
Gender Neutrality	30
Contractions	30
Generic Forms of You	31
Company Culture	31
Conclusion	32
CHAPTER 3 Document, Poster, and Presentation Design	35
Basic Design Elements	36
Written Document Design	36
Margins	36
Headings	36
Widows and Orphans	37
Font Size in Written Documents	37
Font Type and Style in Written Documents	37
Bold, Italics, and Underline	38
All Caps and No Caps	39
Line Spacing	40
Bullets and Numbers	40
Illustrations	41
Charts	41
Diagrams, Schematics, Blueprints, and Equations	44
Tables	45
Maps and Photographs	45
Poster Presentation Design	46
Layout	47
Font	47
Graphics	47
Slide Presentation Design	48
Grammar and Citation	48
Professional Templates and Backgrounds	49
Three Required Slides	49
Color	50
Font Size and Style	57
Visual Composition	57

	CONTENTS ♦ v
Illustrations Words per Slide Points per Slide Slides per Minute Animation and Multimedia Clips Question Anticipation	58 58 59 59 59
Conclusion	60
CHAPTER 4 Working and Writing Collaboratively	63
Management and Work Styles	64
Team Size	64
Establishing a Team Vision	64
Coming to Agreement on Operating Rules and Principles	65
Scheduling and Following Timelines	66
Gantt Charts	67
Status Reports	67
Maximizing Talents  Polos: Loadors Coordinators Team Members	68 69
Roles: Leaders, Coordinators, Team Members The Six Sigma Model	70
Team Stages of Development	71
Team Writing	72
Dividing and Conquering	73
Specializing	73
Concurrent Writing	73
Tools that Assist the Team Writing Process	73
Working Relationships of Subject Matter Experts and Editors	74
Conclusion	75
CHAPTER 5 Telephone, Text, Email, Letters, and Memos	79
Internal vs. External Communication	80
Informal vs. Formal Communication	80
Choose the Best Platform	81
Telephone	81
Text	82
Email	83
Comparison to Letters	83
Comparison to Memos	84

84

Limitations

# vi • CONTENTS

Format	84
Etiquette	87
Letters	88
Letterhead	88
Letter Types	89
Formats	94
Memos	103
Conclusion	107
CHAPTER 6 Reports, Proposals, and White Papers	111
Front Matter	112
Back Matter	114
Reports	114
Feasibility Reports	114
Lab/Test Reports	117
Status Reports	118
Final Project Reports	124
Proposals	139
Request for Proposal (RFPs)	139
Open vs. Closed	139
Solicited vs. Unsolicited	139
Formatting	140
White Papers	156
Conclusion	156
CHAPTER 7 Stand Alone and Supplemental Documents	159
Definitions and Glossaries	160
Definitions	160
Glossaries	162
Instructions and Specifications	162
Instructions	162
Specifications	163
Statement of Work	164
Definition	164
Elements	164
Policies and Procedures	166
Policies	166
Procedures	167
Manuals	167
Conclusion	168
Spider	169

CHAPTER 8 Presentations	171
Live vs. Electronic Media	172
Audience Needs	172
Informative Presentations	172
Introduction	173
Body	175
Conclusion	176
Informative Speech Outline	176
Poster Presentations	177
Poster Presentation Question and Answer Session	177
Persuasive Presentations	179
Maslow's Hierarchy of Needs	179
Monroe's Motivated Sequence	180
Group Presentations	182
Passing the Ball	182
One Mouthpiece	185
Panel Discussions, Symposiums, and Forums	185
Managing Question-and-Answer Sessions	186
Presentations in an International Environment	186
Agents, Customs, and Language	187
Using Technology in Presentations	187
When Technology Fails and It Will Fail	188
Using Interpreters and/or Language Processing Technology	188
Avoid Slang and Sarcasm	188
Speaker's Professional Presence	188
Good Preparation	189
Topic Knowledge and Enthusiasm	189
Hand Gestures	189
Eye Contact	190
Facial Expressions	190
Vocal Inflection, Tone, and Emphasis	191
Good Grammar and Pronunciation	191
Appropriate Attire	191
Body Movement	193
Conclusion	194
CHAPTER 9 Gaining, Retaining, and Advancing Employment	199
The Job Search Process	200
Finding Opportunities	200
A Few Important Considerations	202
Sanitize Social Media Accounts	202

# viii 🔷 CONTENTS

Prepare for Background Checks	202
Be Ethical	203
The Hiring Process	203
Resume Writing and Processing	203
Key Word Searches	203
Tailoring Your Resume	204
Honesty Weitig and Decimal and New Bosses	205
Writing and Designing Your Resume  Cover Letters	205
	216
Interviewing	217
Interviewing Methods	217
Different Types of Interviews	219
Preparation Practicing for the Interview	220 222
Participating in the Interview	222
Third Parties	223
Compensation Negotiation	223
Follow Up	224
Maintaining and Advancing Your Career	225
Conclusion	225
CHAPTER 10 Social Media and Intellectual Property	.229
Social Network Sites Defined	231
Internet and Social Networking Site Usage	231
Screen Reading: The "F" Pattern Phenomenon	232
Creating, Monitoring, and Sanitizing Personal Social Media Usage	232
Creating	232
Monitoring	233
Sanitizing	233
Social Media Use in Employment	234
National Labor Relations Act	234
Corporate Social Media Policies and Guidelines	234
Blogging Guidelines	236
Tweeting Guidelines	236
Corporate Uses of Social Media	237
Newsworthy Uses of Social Media	237
Intellectual Property	238
Trademarks	239
Copyrights	239

	CONTENTS 🔷 ix
Patents	240
Trade Secrets	241
Plagiarism and the Fair Use Doctrine	242
Plagiarism	242
Fair Use Doctrine	243
Employment Agreements	244
Non-Competition Agreements	244
Non-Disclosure Agreements	245
Conclusion	245
APPENDICES	
Appendix A: American English Mechanics Guide	249
Punctuation	249
Periods	249
Commas	249
Oxford Commas	250
Semicolons	250
Colons	250
Exclamation Points	250
Question Marks	250
Quotation Marks	251
Apostrophe	251
Capitalization	251
Sentence Structure Basics	252
The Articles: A, An, and The	252
Comma Splice (C.S.)	252
Fragments (Frag)	253
Gerund	253
Run On (R.O.)	253
Subject-Verb Agreement (S-V) and Verb Tense	253
Mechanics "Trouble Spots"	254
i.e. and e.g.	254
Affect and Effect	255
Because, Since, and As	255
Bored of, bored by, bored with	255
Fewer and Less	255
I or Me (when not alone)	255
Its and It's	256
Lay and Lie	256

## x • CONTENTS

Of and Have	256
Sit and Set	256
That and Which	256
There, Their, and They're	257
Whether and Weather	
Hear and Here	257
Be and Bee Who and Whom	257 257
Whose and Who's	257
Year's and Years'	258
Your and You're	258
Appendix B: IEEE Citation Format	
Books	259
Examples	259
Handbooks	259
Examples	260
Reports	260
Examples	260
Conference Technical Articles	260
Examples	260
Online Sources	260
Example	261
Examples	261
Examples	261
Patents, Standards, Theses, Dissertations, Unpublished Works	261
Example	261
Examples	261
Example	262
Example	262
Examples	262
Periodicals	262
Examples	262
Additional General Reference Rules	263
References in Text	263
References Within a Reference	263
References With URL in Addition to Print Source	263
Reference Abbreviations for Source, Month, and More	263
References Page	263
References	265
INDEX	271

# **ABOUT THE AUTHORS**

#### MARIBETH SCHLOBOHM

Maribeth (Betsy) Schlobohm is a Clinical Associate Professor at The University of Texas at Dallas where she teaches Small Group Communication and Professional and Technical Communication.

Schlobohm is also an attorney and mediator in private practice. Her legal practice is focused in the areas of representing small businesses, estate planning and probate, and mediation. Schlobohm has conducted more than 575 civil and family law mediations. She is a Texas Mediator Credentialing Association (TMCA) credentialed Distinguished Mediator, a distinction earned by less than 80 of her Texas colleagues, and she has served as the Collin County Bar Association Alternative Dispute Resolution Section Secretary in 2008–2010.



Courtesy of Charles Lilly.

Schlobohm is a magna cum laude undergraduate of Texas Tech University where she also received her Master of Arts in Speech Communication, now Communication Studies. She received her Doctor of Jurisprudence from Texas Tech University School of Law, where she was a member of the Texas Tech University Negotiation Team and the recipient of the *American Jurisprudence* Award in Constitutional Law. She is a lifetime member of Phi Delta Phi Legal Fraternity.

#### CHRISTOPHER J. RYAN

Christopher (Chris) J. Ryan is the Associate Director of Rhetoric, Director of Professional and Technical Communication, and a Senior Lecturer in Professional and Technical Communication at The University of Texas at Dallas.

Prior to joining the faculty in 2009, Ryan served in various leadership roles during a 25-year career at EDS/HP. Among his many roles, Ryan served as Manager of Editing & Writing in Corporate Communications, Director of Campus Recruiting, Director of Asia/Pacific Human Resources, Director of Staffing, and Development Consultant for Executives during his tenure with the company.

Ryan holds a Bachelor of Arts in English from St. Edward's University, where he graduated summa cum laude; a Master of Arts in Advertising from The University of Texas at Austin; and a Doctor of Philosophy in Technical Communication and Rhetoric from Texas Tech University.



# **FOREWORD**

Many technical and professional communication textbooks are currently in circulation. Each serves its own purpose. The purpose of this text is to provide a communication foundation for professionals in business and technical industries. Whereas some business and technical communication books seek to guide technical writers, this book seeks to guide those whose roles do not exclusively require writing and editing but whose day-to-day responsibilities demand that they focus in technical or business careers in which a professional level of communication is required. Whether those jobs are in engineering, accounting, finance, or computer science, the subjects addressed and guidance provided in this book will be useful. We have included the most critical communication-oriented needs of professionals, especially those who will be entering the workforce following the completion of their college degrees.

Maribeth Schlobohm

Christopher Ryan

# **ACKNOWLEDGEMENTS**

Whenever you start a long journey, it's your support system that keeps you on the road. The writing of this book was a journey and our support system includes students, colleagues, and family, without whom this book would not have been possible.

Special thanks goes to our engineering, computer science, and business students whose thirst for knowledge caused us to put the "good stuff" into one package between the covers of this book. Thanks go to our colleagues in the School of Arts & Humanities, UTDesign®, and the Erik Jonsson School of Engineering & Computer Science at The University of Texas at Dallas. Because of their input, this second edition is a much-improved sister to our first edition with new sections, samples, an Index and two appendices: American English Grammar Guide and IEEE Citation Format Short Cuts.

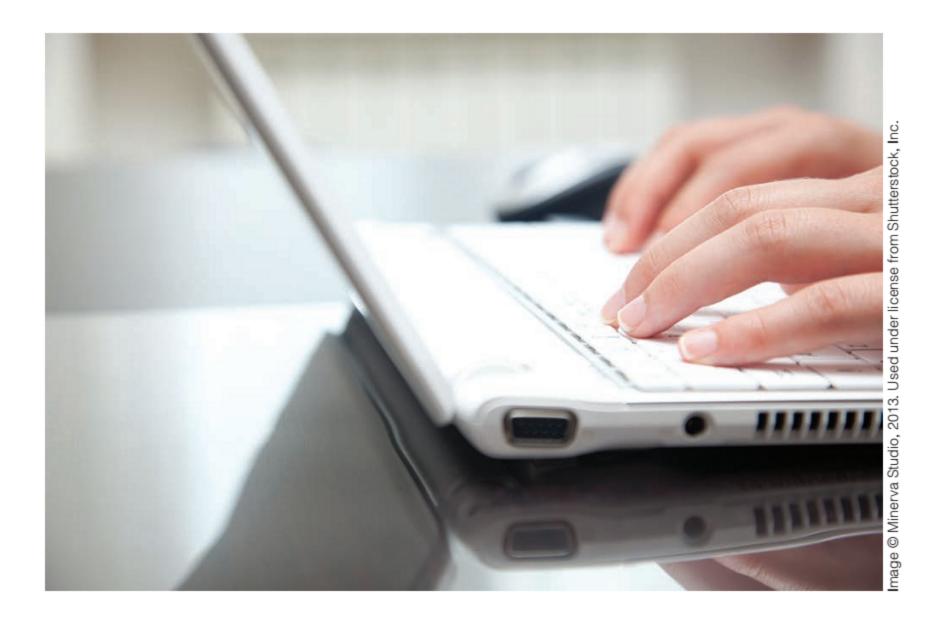
Special thanks to Carie S. Lambert, Ph.D., whose diligent comments and thoughts caused us to improve our writing in every chapter.

No dedication would be complete without recognition of our friends and family who did much hand holding and gave many words of encouragement through the process including Cindy Becker, Bob and Ann Ball, Bill Asher, Betty Grill, and Tina Schlobohm. Additional thanks go to John and Betty, Josie, CJ, and Andy Ryan, whose love of learning and appreciation for formal education serves as inspiration.

Maribeth Schlobohm

**Christopher Ryan** 





#### INTRODUCTION

Professional and technical communication calls for many of the same approaches that we find in other genres of communication, but this communication also differs. Those who have written mostly or entirely for academic purposes need to adjust their writing, especially in style and format, and consider the implications of the communication they construct.

This chapter addresses foundational aspects of professional and technical communication that set it apart from other types of communication. The chapter also addresses style, structure, etiquette, and ethics in professional and technical communication.

#### STYLE

## **Different from Other Forms of Writing**

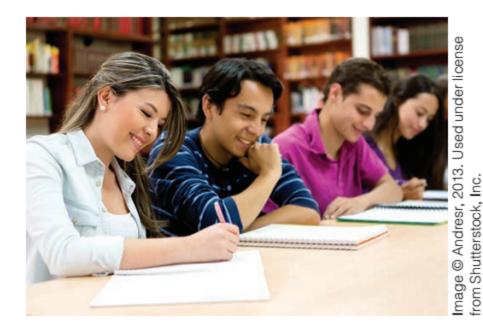
Writing in business demands a different style than most forms of writing. Prior to now, you were taught to produce creative works and essays in your English classes. Perhaps you have experimented with poetry as well. These types of writing have purposes, but their purposes are different than when you write for an audience in a professional setting.

Unlike writing styles in creative pieces such as poetry, short stories, novels, and essays, the style used in professional and technical writing should be simple, which should not be confused with being easy for the writer to write. In fact,

#### QUICKTIP

Sentences and paragraphs should be:

- Clear
- Concise



writing in a simple style is challenging. To write simple, easy-to-understand statements, you must craft each sentence carefully, choosing the most appropriate words to convey the intended meaning and limiting the possibility that other meanings could be construed.

Many forms of writing call for imagery and metaphors, and colorful language can help your reader to better appreciate the text and understand points. The sentences used in building imagery and symbolism can be lengthy and complex, and paragraphs sometimes also may be long. Effective professional and technical writing necessitates short, concise sentences and paragraphs that are easier for the reader to digest. Although detailed descriptions are often useful to provide technical detail, you should save flowery language to help the reader to understand complex ideas.

#### Research Orientation

Technical and professional communication is research oriented. It demands that we strive for objectivity in presenting our arguments. Although you may not achieve true objectivity, as any treatment of a topic will hold your subjectivity (even if only by the topics you choose or the words you use to craft your points), you must try to base your communication as objectively as possible. You can best achieve objectivity through thorough and balanced research.

Thorough and balanced research should consider different ways that you can perform a task or select a product. You should provide information that is complete enough that your reader can understand different options and that gives a fair hearing to different approaches to information. Furthermore, you should use credible sources. Credible sources encourage readers to accept the writer's claims and to provide greater objectivity to your claims.

Consider the continuum below.



When you communicate, the degree to which you insert your subjectivity and to which you try to be objective can vary and can fall anywhere on the continuum. Most sales-oriented communications—e.g., advertising and marketingrelated communication—would fall toward the right, or subjective, end of the continuum. Most technical communication would fall from the center toward the left, or the objective end, of the continuum.

For example, when you present a technical solution to a client, you want your arguments to be as fact based as possible. However, you will not tout the capabilities of your competitors. Therefore, your communication will fall toward the middle of the continuum. For other technical communications, you should strive for the continuum's left, or objective, end, particularly when you are providing

in-house recommendations or analyses. Even when you might want to suggest one option as better than others, you should present information so that your fellow employees or management team can be comfortable that you have explored and considered fairly all options. Doing so enhances your credibility because your audience is less apt to feel like you are selling something.

#### QUICKTIP

Strive for objectivity in business and technical communication by:

- Researching
- Stating facts
- Making logical, well-supported arguments

#### Voice

As you do in other genres, you should write in active voice when performing technical writing. Active voice is when the subject is performing the action and thus is noted first, followed by the action. In other words, a sentence in active voice follows a subject-verb order, and in many cases a direct object follows the verb. Passive voice occurs when you introduce the action (and possibly the object receiving the action) before you note the subject. (Passive voice exists with a form of to be—am, is, are, was, were, be, being, or been—with the past participle (or "-ed" form) of the verb and a present or insinuated "by whom." Examples of active and passive voice follow:

- Active voice—The engineer wrote the manual.
- Passive voice—The manual was written by the engineer.

Readers find sentences in active voice easier to comprehend quickly, because we have been trained to expect the "doer" or actor to appear first, followed by the action. In these examples, the sentence in active voice presents the subject (engineer) and then the action or verb (wrote) and further follows with the object (manual). In the sentence in passive voice, the order is reversed: The object (manual) begins the sentence, the action or verb (was written) follows, and the subject (engineer) falls to the last of the three parts of the sentence and answers "by whom."

Unlike other genres, technical writing is more accepting of passive voice, as long as you use it strategically. Strategies for using passive voice include:

- Situations in which the subject or "doer" does not matter or is unknown
- Circumstances that call for a variation in the pattern
- Writing in which you want to soften a message for more sensitive or diplomatic communication

#### When the Subject Does Not Matter or is Unknown

Many professional and technical communication pieces are intended to be instructive. For example, when you construct a manual of assembly instructions, you introduce the steps in the process to complete the assembly. Usually, the doer who performs the steps does not matter, and you may not know or care who will be following your instructions, as long as the steps are completed. Consequently, you may choose to remove the subject and write each step as a sentence fragment or to apply passive voice in complete sentences. Like assembly instructions, lab reports serve as an example of communication pieces in which the subject may not matter.

#### When Variation May Be Appropriate

When you write a document that involves multiple sentences, the same pattern used over and over can become monotonous to the reader. Although active voice may be appropriate for most of the document, you may break that monotony by occasionally using passive voice in a sentence. You may also use passive voice to create transition between sentences—to begin a sentence with information the reader already knows and end with new information that you need to emphasize.

#### QUICKTIP

Use passive voice when the doer does not matter or when variation is necessary.

#### When Sensitivity or Diplomacy Is Preferred

Although active voice may benefit the audience because of clarity and understandability, the reader may receive active voice as being too direct, perhaps even harsh. When you want to make a point with

your reader, you may wish to do so without blaming or being blunt. For example, in the workplace, you may need to convey bad news or criticize your team without hurting the recipients' feelings or lowering team morale. In such an instance, passive voice can help. If you need to convey bad news, you can soften your message, saying, "The release of our product has been delayed," instead of "Our research and development team delayed the release of our product." Thus, you can still inform the customer that an eagerly awaited product will not be ready as originally planned, but you can also stop short of blaming a department

#### QUICKTIP

Use active voice *unless* there is a strategic reason for passive voice such as when you want to tone down potential harshness.

within the company for the delay. Similarly, if you as a manager need to admonish your team but want to protect morale, you can write in a memo, "The parts were manufactured poorly," rather than, "You manufactured the parts poorly." You convey the criticism but in a manner that is less confrontational.

# Shifting Writing Orientation from Self to Audience

Given that professional and technical communication is performed in many instances to persuade someone to act—whether to approve a recommendation, complete the steps of a process, agree to support the development of a plan, or take action—you should communicate with the reader in mind. You must consider what is important to the reader rather than focus on what matters to you. Salespeople are taught to think about the "What's-in-it-for-me?" question that consumers are likely to ask. In the same respect, when writing business documents, you should ask what your reader values, needs, and expects so you can address the topic and make it more understandable and thus persuade your reader to accept your call to action.

# Designing for Easy Navigation

You should also design professional and technical communication so your readers can find what they need and digest the material in a simple fashion.

Ask yourself the following question: "Do I read every word of a document or website?" If your answer is "yes," you are among the rarest of readers. If, on the other hand, you answered "no" because you scan documents to find what you are seeking, then you are among the majority of people. Knowing that readers typically will scan your words, you must design your communications so your readers can easily find what they seek. You can accomplish this in a variety of ways, including clear demarcation of sections with sensible headings, short paragraphs, and placement of key points within documents where readers are most likely to find those points.

#### Headings

Headings and subheadings help readers find the important information in documents or websites. As a table of contents guides readers to the different topics and sections within a book, headings and subheadings help readers to quickly find information that they need in shorter documents, such as reports and memoranda, and to navigate different sections and pages on a website. Dividing lengthy communications into smaller, bite-size chunks with a few words that summarize what the text contains is an effective way to ensure that your readers will more easily find what they need.

Consider this textbook. In designing it, we could have written our points without delineating sections or chapters, but we adopted the common convention of chapters so the topical matter can be categorized for easier consumption. We then had the choice to allow the chapters to be the only means to categorize and separate topics. But we chose to provide headings and subhead-

ings to further break down the subject matter so you can more easily read and locate information in the book.

In addition to headings and subheadings, numbers, letters, or an alphanumeric combination to divide sections may further guide your readers and may provide easy reference.

#### QUICKTIP

Use headings and subheadings for fast and easy navigation through written communication.

#### Placement of Key Messages

In addition to considering headings and subheadings, you should think about where you should place your key messages. You know that your readers probably will not read every word of every document you write; therefore, you should address your key messages at the beginning and end of your document. Similarly, you should build each of your paragraphs with the main points at the beginning and end.

#### STRUCTURE

Most professional documents should include an introduction, a body, and a conclusion. These sections are always appropriate, even when other sections are necessary.

#### Introduction

The introduction should include a statement of purpose, and if you provide your readers with a call to action, you may inform the reader of that call as part of the purpose. The introduction should provide sufficient context for the reader to understand why the author of the document is writing. You also should use the introduction to provide a forecast of what will follow in the body. A well-articulated forecast can set the structure for the body of the communication.

The introduction may vary in length, depending on its purpose. For example, for a memo or business letter, the introduction is typically the opening paragraph, while a longer report may involve more than one paragraph. Regardless, the introduction should contain the purpose and context.

# **Body**

In the body of a business document, letter, or report, you should address with greater detail the topic(s) you indicated you would address in the introduction. If the topics involve arguments or recommendations of any kind, you should include in the body all of the supporting facts that strengthen the arguments or the case for the recommendation. If in the introduction you provided a forecast of what would follow, you can follow the same order for the paragraphs in the body.

#### QUICKTIP

When writing business and technical documents use:

- Introduction
- Body
- Conclusion

#### Conclusion

In the conclusion of a professional or technical communication, you should close the document by summarizing key points. If you expect any action of the reader, clearly state that action in the conclusion.

#### Consider the email message below:

John,

I am following up with you regarding your question yesterday as to whether I would suggest that we hold our planning meeting at our office meeting room or offsite at the meeting room at our company's corporate apartments. I would like to briefly address advantages and disadvantages of the options as well as team member preferences.

Both rooms provide sufficient work space, large tables, comfortable chairs, sufficient numbers of electrical outlets and projectors with screens, so I do not think that either location holds an advantage over the other in terms of resources and accommodation. However, I think our office meeting room has the disadvantage of being near other departments, and past experience tells me that if we are in the building, people from other departments will interrupt our meeting for questions and service needs. The offsite location gives our team a meeting room in which we can conduct our planning without interference.

I have spoken with all 12 of our team members to capture their preferences. Nine would prefer the offsite location, largely due to the fact that they will be able to focus fully on the necessary planning without interruption.

Given the greater opportunity for our team to focus on planning and the preferences of our team members, I suggest that you select the offsite corporate apartment meeting room for our meeting. Please let me know if you have any guestions or concerns.

Jennifer

In the email message above, the first paragraph provides the introduction. Note how the writer, Jennifer, states her purpose and provides context. She also forecasts what will follow by noting the two topics (advantages and disadvantages, team member preferences) that she will address.

The second and third paragraphs are the body of the message. In these paragraphs, Jennifer goes deeper into the details. These paragraphs contain a detailed message; they give the reader a better understanding of the topic. Note also that because Jennifer forecasted in the introduction the two topics she would address, she has established the structure for the body. In the body, she addresses the two topics in the same order she named them in the introduction.

Jennifer's final paragraph is the conclusion. In her conclusion, Jennifer briefly summarizes her main points and provides her call to action, which includes her recommendation to John and a request that he contact her if he has any questions or concerns.

Although length and purpose will vary, this introduction, body, and conclusion format can work for any correspondence in the business world.

# **Time and Space Limitations**

Professional communications are limited by time and space. Whether you are walking down the hall while making a request to your boss, writing a recommendation report to your department head, or presenting to other staff or clients, you have limits to the time you have to convey your message or to the space that your communication may take if you expect it to be read in a timely fashion. If you are proposing a new process that you want your company to adopt but you ramble with a 30-minute presentation that spills over a ten-minute time slot that you had been granted, you may lose your audience and any chance that your recommendation would be approved. Similarly, if you need your boss to approve funding for a time-sensitive need, you may not get her to approve your request in time if you deliver a lengthy document at 5:00 p.m. and ask for a response by the following morning. If you are inconsiderate of time or length, you can defeat your purpose.

Even lengthy responses to what businesses call requests for proposal (RFPs) should follow the guidelines established by the government or business that puts forth the RFPs to receive competing proposals from businesses. You must meet time limitations on presentations and follow all protocols for documenta-

#### QUICKTIP

Always consider limitations of:

- Time
- Length

tion, including length where applicable. But aside from reports that by necessity require extensive technical and financial data and descriptions, you, as the writer of business documents, should strive for a balance between sufficient detail for understanding and brevity.

#### **EDITING**

You should never deliver a rough draft as a finished work product. Always leave time to edit work before the delivery deadline on written communications, including formal reports, proposals, white papers, manuals, specifications, policies and procedures, and technical definitions and glossaries.

Many beginning business and technical writers make the mistake of relying on spellcheck and grammar-check software to make necessary editing choices in their writing. Spelling- and grammar-checking software can be helpful, however these programs correct spelling but may choose an incorrect word.

#### Grammar

The most common mistakes in technical communication are grammatical errors. We could fill an entire book exploring grammatical errors, and as a beginning business and technical writer, you are encouraged to purchase a good grammar guide if grammar is an issue. Correct grammar is critical in business and technical communication for your reader's understanding. Furthermore, grammar is important because it affects how a business person is perceived with regard to credibility and professionalism. You can find more information in Appendix A of this text, and we will address grammar here to bring attention to the most common mistakes, which include the following:

- Subject–verb agreement
- Articles: a, an, and the
- Commas, semicolons, and colons
- Sentence fragments and run-ons sentences
- Gerunds
- Pronouns: he, she, and it
- Parallel sentence structure and bulleted points

These few spelling and grammar tips are just the starting point for editing and reviewing written communication. Practicing writing with a focus on proper grammar will increase your ability to communicate well with professional audiences.

#### Subject-Verb Agreement

Perhaps the most common problem for beginners with English-speaking technical and business writing is subject-verb agreement. English is very complex and contains singular and plural nouns as well as present, past, and past perfect tenses. The key to subject-verb agreement is not in the verb tense; it is in the subject. Once the writer determines whether the subject is singular or plural, the verb follows to complete the sentence and the thought. As with many other languages, English conjugates verbs. The following example is for the verb to be:

I am You are He, she, or it is They are

Terms such as each, somebody, anyone, and no one are singular nouns. For example, with the verb to be, each as well as the other singular words are always followed by the singular is.

#### **Articles**

Failure to use articles and/or to use the correct article are common problems for non-native English speakers and writers, as they may not use articles in their native languages. English, however, uses articles, which help a receiver of communication to understand whether you are speaking generally or specifically. You should use the when referring to a specific person, place, or thing and a or an when you reference a non-specific person, place, or thing. For example, if you are referring to a specific company, you should write the company, but if you are referring to any company, you should write a company.

#### Commas, Semicolons, and Colons

Many beginning business and technical writers overuse commas, which causes comma splices, and misuse semicolons. To avoid semicolon problems, break a compound and complex sentence into two separate sentences. The readers will appreciate the break, because your sentences will not be five or six lines long each. Lengthy sentences can be difficult to comprehend. Shorten your sentences and forgo the use of most semicolons.

Colons are also difficult for beginning technical and business writers. Colons are most commonly used after a complete statement and before a bulleted list or a list followed by many commas and finally the period.

You should use commas to separate items in a series. For example, "The company's expenses, revenue, and profits increased in the most recent quarter." Note, however, that some style guides may not require the last comma in the series (the one before and). You should also use a comma before a conjunction that joins two independent clauses. An example of a comma used before a conjunction that joins two independent clauses follows: "The company's profitability spiked in the third quarter, but income dipped in the fourth quarter to its lowest level in three years." Commas are also necessary when setting off a phrase that introduces a subject in a sentence, as the following example illustrates: "Having spiked in the third quarter, the company's revenue dipped in the fourth quarter to its lowest level in years." One more common use of commas is to set off a word or phrase that renames or identifies another word. An example of this use of commas is as follows: "The company, a leading provider of information technology services, recorded a spike in its third quarter revenue."

### Sentence Fragments and Run-ons

Sentences require, at a minimum, a subject and a verb. Sentence fragments occur when the verb (or sometimes the subject) is missing. Run-ons occur when a sentence rambles in a wordy journey, failing to make a point or when two sentences are connected without appropriate punctuation or conjunctions. Avoid run-ons by breaking up your thoughts into clear and concise sentences that contain one major idea.

#### Gerunds

Gerunds are nouns or noun phrases masquerading as verbs. An example of a gerund would be, "I like writing reports." Writing is not the verb in this sentence. The verb is like, and writing is a gerund. It is a noun that joins reports to form a noun phrase. Gerunds most frequently appear as "-ing" words. Verbs that end with "-ing" are also used for creating active voice, so the writer must identify the purpose of the word to know if an "-ing" word is a verb or a noun.

#### **Pronouns**

Sometimes, you will use the pronouns he or she to identify the gender of a specific person. If your boss is female and you are writing or speaking about that specific person and not bosses in general, you can use she as the pronoun for that specific person. Speaking and writing about specific people in specific roles requires the use of the pronoun that reflects the gender of that specific person. This principle differs from using non-gender-biased language, which interchanges he and she or uses he/she, s/he, or she/he. Non-gender-biased language is used when writing about all persons in a field, as in all engineers at the company, which could be a group of engineers with both male and female engineers.

One way you can ensure that pronouns agree with their antecedents is to make both the pronouns and their antecedents plural. For instance, if you want to state that an engineer should always be on his best ethical behavior, but you do not want to offend female engineers with the use of *he*, you could make your pronoun and its antecedent plural: "Engineers should always be on their best ethical behavior."

#### **Parallel Structure**

Parallel structure is important in compound and complex sentence structures. Parallel structure will clarify sentences and solve verb tense problems. You should

also use parallel structure for items in a bulleted list. For example, if the bulleted items start with verbs, all of the items start with verbs, and if the bulleted items start with nouns, all should start with nouns. The best bulleted items generally begin with verbs in active voice.

#### Additional Resources

For more guidance on grammar, use one of the useful grammar resources that you can find in print and online. A short list of these includes the following:

- Purdue Owl, Online Writing Lab (http://owl.english.purdue.edu/owl/ section/1)
- Grammar Girl: Quick and Dirty Tips for Better Writing (http://grammar .quickanddirtytips.com or in print by M. Fogarty (2008), St. Martin's, ISBN: 978-0-8050-8831-1)
- McGraw-Hill Handbook of English Grammar and Usage, 2nd ed., M. Lester and L. Beason (2012) McGraw-Hill, ISBN-13: 978-0071799904
- Only Grammar Book You'll Ever Need: A One-stop Source for Every Writing Assignment, S. Thurman and L. Shea (2003), Adams Media Corporation, ISBN-13: 9781580628556

#### **ETIQUETTE**

Most of us are well practiced at the art of composing informal messages to friends and family members. When you post a handwritten note on the refrigerator, send an email message, or write a brief text, you may omit elements that you should include in professional communication. For example, you may not include a greeting or name the person for whom your informal message is intended. You also might use slang or abbreviate terms in these informal situations. Additionally, you may omit your name when the reader knows or can guess who you are (especially in the cases of email and text messages).



© Konstantin Chagin, 2013. Used under icense from Shutterstock, Inc.

Communication in professional settings requires appropriate business etiquette. The communication expected in these settings has a higher standard than that for the communications that we create informally for friends and family. For example, without applying business etiquette to a note for a manager, an employee might compose an email message as follows:

An employee who would write with such informality will not be regarded as being as professional as one who composes the same question but with a formal, professional tone:

Sally,

I am checking with you to see if you will need me to work this coming Saturday. Please let me know at your soonest convenience.

Thank you.

Robert

In the above examples, you can see the difference in tone that is created by the added formality. The more formal email extends respect to the recipient by addressing her by name. The short body of the note that follows the greeting gives context and a mannerly request. You may argue that the informal note could achieve the objective just as well as the formal note, and you could be right to make that argument. However, note that, in professional communication, how you communicate is often as important as what you communicate. Thus, a manager might be irritated by the informality and lack of respect displayed in the first example and could choose not to respond to the message. In that case, the informal note would not achieve its purpose. Given that your communication in the professional environment is often intended to persuade your readers to perform an outcome, a respectful, dignified formality can be useful in enhancing our chances of achieving your objectives.

Consequently, in professional and technical communication, you should write with greater formality in all forms of communication, whether they are reports, business letters, or even internal messages. In some forms of professional communication—such as business letters, memoranda, and reports—standard business formats will guide us toward a higher level of formality. (We will address those formats more fully later in this book.)

Etiquette also comes into consideration in business meetings and phone conversations. Etiquette in these interactions—showing others respect by listening to what they have to say and not talking over them—is an important place to start. Projecting your own points in a way that respectfully addresses others is also important and enhances the likelihood that others will listen to you and be more disposed toward responding favorably to your calls to action.

#### **ETHICS**

Business people can have excellent grammar skills and etiquette, but if they do not behave ethically, their communication skills will matter little. The term *ethics* is defined by the Oxford Dictionaries in two ways:

- 1. "Moral principles that govern a person's behaviour [sic] or the conducting of an activity"
- 2. "The branch of knowledge that deals with moral principles"

<sup>&</sup>lt;sup>1</sup>"Ethics." Oxford Dictionaries, available at http://oxforddictionaries.com/definition/english/ethics, retrieved: 3/19/14.

Ethics are important to matters in business, and ethics arise in professional and technical communication in matters such as deciding and conveying right versus wrong, giving credit when it is appropriate, and ensuring the safety of those who use our products and services. Ethics should not be confused with "legal," because not all ethical matters are codified in law. However, some elements of the law overlap with ethics because society has determined many matters of right versus wrong should be made law. But when laws do not apply and the code of ethics of an enterprise or an industry group does not provide sufficient detail to spell out the appropriate course of action to take in a business matter, professionals are left to decide for themselves what the right thing to do may be. And just as laws vary from one jurisdiction to another, so, too, do views on what is ethical.

In many high-profile stories involving ethics, employees (up to senior levels of companies) have elected to do what is most expedient or what appears to give the individual or the company an advantage, often a financial benefit. But what may look beneficial in the short term often ends up being detrimental in the long term. Many of these stories end up harmful to those who have made the wrong ethical decisions, as well as to their companies, their customers, and their investors.

### Knowing and Doing Right versus Wrong

As a member of a business enterprise, you should conduct yourself so that you choose right from wrong, but this is not always as easy as it sounds. Many companies have written codes of ethics that they require their employees to sign. Similarly, many industry associations have written codes of conduct or guidelines for ethical behavior that can be found on the Internet. Following are just a few examples:

- Association for Computing Machinery (ACM)—http://www.acm.org/about/ code-of-ethics
- American Management Assocation (AMA)—http://www.amanet.org/ HREthicsSurvey06.pdf
- Institute of Electrical and Electronic Engineers (IEEE)—http://www.ieee.org/ about/corporate/governance/p7-8.html
- National Society of Professional Engineers (NSPE)—http://www.nspe.org/ Ethics/CodeofEthics/index.html
- Society for Technical Communication—http://archive.stc.org/about/ethicalprinciples-for-technical-communicators.asp

These codes can help to provide guidelines of acceptable and unacceptable behavior, but no code of ethics can possibly provide direction on every possible behavior an employee can undertake during the course of a career. You therefore need to consider the many possible implications of your communication and your actions.

# Giving Proper Attribution

When you produce business documents, such as reports and proposals, you often conduct research to help support your arguments. You do so because you build a stronger case on facts than on opinion. Your research can yield useful points, statistics, tables, graphs, and photos that can help to strengthen the claims you make. As you make use of these points, statistics, tables, graphs, and photos, you must credit your sources. Using someone else's information without proper attribution in your writing and presentations is plagiarism in business, just as it is in academics.