



STRATEGIES for
TECHNICAL
COMMUNICATION
in the **WORKPLACE**

SECOND EDITION

Laura J. Gurak • John M. Lannon

Get the most out of this course by using the *Strategies for Technical Communication in the Workplace* Web Site and MyTechCommLab.

Strategies for Technical Communication in the Workplace Web site www.pearsonhighered.com/gurak

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- ▶ *Hot Topics* link to additional Web sites that explore emerging issues in technical communication.
- ▶ *Multiple Choice Quizzes* can be submitted online for grading.
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- ▶ *Key Terms Flashcards* enable you to memorize terms introduced in-chapter.

General Resources

- ▶ *Projects and Case Studies* are extended situations showing book concepts in a real-world context.
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Model Documents

Resources related to specific technical communication documents, including interactive sample documents, practice exercises, and more.

Document Design

Design, graphics, and Web design resources, including instructional materials, practice exercises, and quizzes.

Case Studies

A full range of case studies—with related activities—demonstrating how technical communication documents are utilized in real-world situations.

Writing

Resources that help students improve their writing skills including activities, audio and video lessons, and quizzes.

Grammar

Learning tools to help students improve their grammar skills, including diagnostics, exercises, audio and video lessons, and more.

Research

Resources to help students navigate the research process, including reading materials, audio and video lessons, sample research papers, practice exercises, and more.

* If an access code is not packaged with this text, go to www.mytechcommlab.com to learn how to access this remarkable collection of resources.

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Why Do You Need This New Edition?

Here are six good reasons why you will benefit from buying this new edition of *Strategies for Technical Communication in the Workplace!*

1. **A new stand-alone chapter on email and text messages.** The workplace uses of email are now covered in a separate chapter; with a revised section on when to use email or text messages for workplace communication.
2. **A new stand-alone chapter on blogs, wikis, and social networks.** Corporate blogs and wikis are now discussed in a separate chapter; with a new section on using social networks such as Facebook, Twitter; and LinkedIn to find a job and to communicate on the job.
3. **A new stand-alone chapter on ethics.** The important topic of workplace ethics is now covered in a separate chapter with new material on ethical dilemmas and choices, as well as new sample documents.
4. **Increased focus on audience analysis.** The newly titled “Providing Audiences with Usable Information” chapter has been thoroughly revised to focus on how to write persuasively in addition to analyzing audience/purpose and creating usable documents.
5. **New coverage of online videos in the Web pages chapter.** The chapter on Web pages now includes a section on how to create online videos, a topic unique to this text.
6. **New Learning Objectives boxes.** Each chapter now begins by previewing the knowledge and skills that you will learn as you read the chapter and complete the assignments. These objectives are reinforced with end-of-chapter links to material available on MyTechCommLab, a rich online resource that provides you with interactive resources to help you improve your technical communication skills and get a better grade.



STRATEGIES FOR
**Technical
Communication
in the Workplace**

SECOND EDITION

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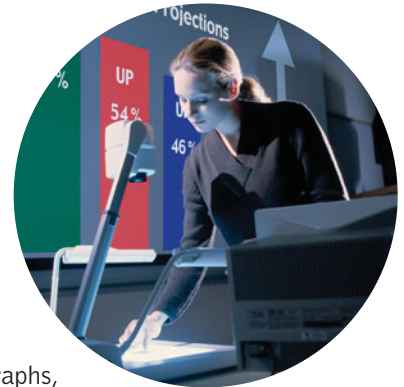
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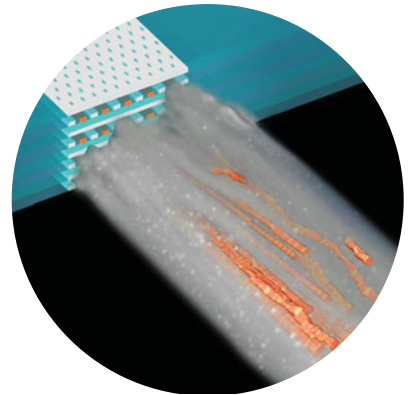
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PREFACE

OVERVIEW

In today's workplace, professionals in all fields are expected to adapt to a variety of communication situations. Virtually everyone must be able to write routine workplace documents such as memos, emails, letters, and informal reports. In addition, they must create more complex forms of communication such as formal reports and proposals, instructions, definitions and descriptions, Web pages, oral presentations, video presentations, and more. All the while, these professionals must also negotiate technological innovations, communicate in a global marketplace, work in teams, write persuasively, research effectively, and understand the ethical implications of the documents they produce.

We wrote the first edition of *Strategies for Technical Communication in the Workplace* as a medium-length textbook that covers all the preceding topics thoroughly and concisely. Like the first edition, this second edition text draws on the strengths of our other two technical communication books: the best-selling *Technical Communication*, 12th edition, and *Concise Guide to Technical Communication*, 3rd edition. We hope that students and faculty alike will appreciate the new edition of this distinctive textbook.

NEW TO THE SECOND EDITION

We have targeted most of our second edition changes to Parts 1 and 4 of the book to provide more background on such topics as audience analysis and ethics (Part 1) and more about the latest technological innovations in today's workplace (Part 4). Following is a quick guide to what is new in this edition.

An Expanded Part 1 on Technical Communication Foundations

To provide more information on foundational topics in technical communication, we have split the first edition's multitopic Chapter 2 into three distinct chapters. Chapter 2 now focuses exclusively on the related topics of teamwork and global issues in technical communication. Persuasion, formerly in Chapter 2, has been moved into Chapter 4 (now titled "Providing Audiences with Usable Information"), where it allows for an increased emphasis on audience analysis. The important topic of workplace ethics, also previously included in Chapter 2, is in a new stand-alone Chapter 5 ("Recognizing Ethical Issues in Technical Communication") and has been expanded to include discussions of ethical dilemmas and types of ethical choices. This chapter also includes relevant new figures.

A Thoroughly Revised Part 4 on Digital Media and Presentations

Part 4 conforms to the latest innovations in digital workplace communication and oral presentations. Workplace uses of email are now covered in a stand-alone chapter (Chapter 19, “Email and Text Messages”), with a new up-to-the-minute section on using text messages on the job. Corporate blogs and wikis are now discussed in a stand-alone chapter (Chapter 20, “Blogs, Wikis, and Social Networks”), with a brand new section on using social networks (such as Facebook, Twitter, MySpace, and LinkedIn) to communicate on the job or to enhance one’s career. The chapter on Web pages (Chapter 21, now titled “Web Pages and Online Videos”) has been expanded to include coverage of online videos, increasingly a component of today’s corporate Web sites. Finally, Chapter 22 (“Oral Presentations”) includes new material on the various types of presentation software available.

New Learning Objectives

Learning Objectives boxes have now been added to every chapter’s opening page to give students a goal-oriented preview of the skills they will be expected to learn. These Learning Objectives are followed up at chapter’s end with links to topic-specific areas of Pearson’s MyTechCommLab.

KEY FEATURES

To help you get a better idea how *Strategies* works as a whole, following is a point-by-point discussion of the key features of this book.

Complete but Streamlined Coverage

Strategies includes all topics essential for an undergraduate technical communication course in a compact yet thorough format. The book covers everything technical communicators need to know—from writing basic letters and memos, to writing complex proposals and formal reports, to delivering oral presentations and writing for the Web—in roughly 500 pages. In addition, *Strategies* offers innovative coverage of emerging technologies used in the workplace, including text messages, social networks, and online videos.

Emphasis on Student Practice

This book is guided by the idea of providing students with practical, accessible concepts that are easy to follow and that get students writing and designing documents immediately. One key feature, as the title suggests, is the Strategies box, which provides step-by-step advice to follow in writing and discussing a given document. In

addition, chapters in Parts 3 and 4 emphasize the importance of “doing” immediately via the Let’s Get Started feature; students are asked to draft their best version of each chapter’s document type or communication situation before they read the chapter. Then, as they work through the chapter content, students are encouraged to review and revise their original work. Finally, every chapter, including the foundational and “blueprints” chapters in Parts 1 and 2, includes Applications exercises, grouped into general, collaborative, global, and computer/Web-based categories.

Clear Explanations and Straightforward Organization

As we wrote and organized this book, we kept in mind five essential questions students most frequently ask: “What needs to be done?,” “What should it look like?,” “How do I do it?,” “What should be avoided?,” and “How well have I done it?” The features described previously focus on these questions. Also, marginal notes summarize and reinforce main points in each chapter.

Chapter Outlines and Learning Objectives boxes at the beginning of each chapter preview what is to come, whereas the heading structure moves logically from point to point. In addition, the Strategies boxes in each chapter provide a systematic way to prepare documents or presentations.

The chapter sequence in *Strategies* proceeds from general foundational concepts and blueprints in Parts 1 and 2 to cumulatively more complex writing and communicating situations in Parts 3 and 4.

Practical Pedagogical Features

Strategies includes several practical, easy-to-access pedagogical tools. These features include

- **Chapter Outlines and Learning Objectives.** On the opening page of each chapter, the outlines provide a quick orientation to the chapter topics and sequence, whereas the learning objectives emphasize the practical skills students can expect to acquire.
- **Let’s Get Started boxes.** At the beginning of each chapter in Parts 3 and 4, the Let’s Get Started boxes encourage students to begin “doing” immediately by producing the type of draft document or communication product discussed in each chapter based on their prior knowledge. Then as they work through the chapter, students can refine their draft.
- **Strategies boxes.** Featured in every chapter, the “Strategies” boxes summarize key strategies discussed in the text, and provide additional pointers for approaching each communication situation.
- **Checklists.** End-of-chapter “Checklists” summarize each chapter, and more importantly, they emphasize “doing” by asking students to check off each item as they review their work.

- **Applications.** Called “applications” rather than “exercises” to emphasize applied learning, the end-of-chapter Applications fall into four categories: General Applications (for individual practice), Team Applications (for pair or group practice), Global Applications (for highlighting global issues in workplace communication), and Computer/Web-based Applications (for highlighting the use of technology in workplace communication).

Realistic and Accessible Annotated Model Documents

Model documents resemble the kinds of documents students will write in the workplace. Accessible, engaging, and easy to emulate, most of these documents are fully annotated.

Consistent Focus on Audience and Purpose

Technical communication in the workplace is more than a mere exercise in “information transfer”; it is also a social transaction involving individuals, teams, companies, and organizations that are national and international in scope. In the contemporary workplace, a one-size-fits-all approach to technical communication doesn’t work. Effective communication must be tailored for different audiences and different purposes. Today’s communicator must be smart about researching, summarizing, and customizing information to meet many different situations. *Strategies* has therefore been designed to provide much more than a “cookie cutter” approach to creating typical workplace documents and making presentations by focusing on key rhetorical principles of audience and purpose.

The Latest Technology and Global Issues Coverage

With the Internet and digital technology at our fingertips and with companies and teams spread across the world, communication reaches a wide audience and often is transmitted instantly. We receive or convey professional information in a variety of ways—handwritten, in word-processed documents, via email or text messaging; in video format; as a Web page; via blogs, wikis, or social networks; or as live presentations—and each medium and potential audience brings with it unique challenges about how to best present the information. *Strategies* incorporates relevant technology coverage and stresses the importance of thinking about global audiences wherever relevant.

ORGANIZATION OF THE BOOK

Strategies begins with foundational concepts, then moves to “blueprints,” and finally applies the foundations and blueprints to increasingly complex documents and communication situations.

- **Part 1 (“Foundations”)** introduces the underlying concepts for creating effective technical communication. This section provides a definition of technical

communication (Chapter 1); discussions of teamwork and global issues (Chapter 2); coverage of research as a pivotal part of technical communication (Chapter 3); an introduction to the analysis of audience, purpose, and other factors (Chapter 4), and in-depth coverage of workplace ethics (Chapter 5).

- **Part 2 (“Blueprints”)** builds upon Part 1 by discussing four basic considerations for approaching each type of workplace document or communication situation: understandable structure (Chapter 6), readable style (Chapter 7), audience-centered visuals (Chapter 8), and user-friendly design (Chapter 9).
- **Part 3 (“Documents”)** applies the previous foundations and blueprints, presenting increasingly complex types of print documents. This section begins with the types of documents students need to get hired and concludes with the two most complex types of documents: formal reports and proposals. Specific documents covered in Part 3 include résumés and other employment materials (Chapter 10), memos and letters (Chapter 11), definitions (Chapter 12), descriptions (Chapter 13), instructions and procedures (Chapter 14), summaries (Chapter 15), informal reports (Chapter 16), formal reports (Chapter 17), and proposals (Chapter 18).
- **Part 4 (“Digital Media and Presentations”)** provides guidance for creating documents for digital media and for giving oral presentations. Included are chapters on email and text messages (Chapter 19); blogs, wikis, and social networks (Chapter 20); Web pages and online video (Chapter 21); and oral presentations (Chapter 22).
- **Appendices A (“Documenting Sources”) and B (“Grammar, Usage, and Mechanics”)** offer guidance on citations and grammar. Appendix A includes guidelines for avoiding plagiarism and documenting sources completely and accurately. Appendix B provides a brief handbook of grammar, punctuation, mechanics, and usage. This appendix also includes useful advice on formatting lists and using transitions in written work.

SUPPLEMENTS TO THE BOOK

Accompanying *Strategies* is a wide array of instructor and student supplements, most of which are available packaged with this book at no additional cost.

For Instructors

- **Instructor’s Manual, by Lee Scholder, University of Minnesota, and Daun Daemon, North Carolina State University.** Available both in print and online, the Instructor’s Manual includes general and chapter-by-chapter teaching tips, sample syllabi, and additional chapter exercises and quizzes. In addition, the

Instructor’s Manual provides guidance on using MyTechCommLab and the companion Web site as online teaching resources.

- **Companion Web site** <www.pearsonhighered.com/gurak>. The “Instructor Resources” portion of the companion Web site includes teaching strategies, PowerPoint slides, Web links, sample syllabi, and the complete text of the Instructor’s Manual in downloadable PDF format.

For Students

- **Companion Web site** <www.pearsonhighered.com/gurak>. The companion Web site features self-scoring multiple choice quizzes, exercises, case studies, tutorials, key terms flashcards, and printable versions of the book’s checklists and forms.
- **MyTechCommLab** <www.mytechcommlab.com>. Instructors who package MyTechCommLab with *Strategies* provide their students with a comprehensive resource that offers the best multimedia support for technical communication in one integrated, easy-to-use site. Features include a wide selection of interactive model documents; realistic case studies covering all areas of the technical communication field; and comprehensive sections on document design, writing, grammar, and research that include audio and video lessons, practice quizzes and assignments, and much more. MyTechCommLab’s grammar diagnostics produce personalized study plans that help students improve their grammar skills outside of classroom time. A dynamic Composing space provides students with writing, grammar, research, and online tutoring help in one convenient place, with flexible commenting tools that make peer review projects easier to execute. For instructors, MyTechCommLab’s commenting tools and gradebook help reduce the amount of time they spend grading assignments and make it easy to capture, assess, and manage student submissions and practice results. MyTechCommLab is available packaged with *Strategies* at no additional cost or for purchase at <www.mytechcommlab.com>.
- **Interactive Pearson eText.** A dynamic, online version of the text is available with a subscription to MyTechCommLab. Icons throughout the text link students to animations, interactive documents, case studies, and activities to create an enriched, interactive learning experience for students.
- **À la Carte Edition.** Students want choices, so we’ve created a line of highly portable and affordable books which gives them just that: our *à la Carte* editions. *Strategies for Technical Communication in the Workplace*, *à la Carte* edition features the exact same content from the traditional textbook in a convenient notebook-ready, loose-leaf version—allowing students to take only what they need to class. Best of all? Our *Books à la Carte* titles offer students a savings and typically cost less than a used textbook!



- **CourseSmart.** Students can subscribe to *Strategies* as a CourseSmart eText (at CourseSmart.com). The site includes all of the book's content in a format that enables students to search the text, bookmark passages, save their own notes, and print reading assignments that incorporate lecture notes.
- ***Resources for Technical Communication, Second Edition (ISBN: 0-321-45081-7).*** This print supplement offers a wide range of sample documents for use in technical communication courses, including letters, proposals, reports, memos, emails, résumés, abstracts, instructions, descriptions, and slide presentations.

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—Laura J. Gurak and John M. Lannon

PART

1

Foundations

- 1 Introduction to Technical Communication
- 2 Teamwork and Global Issues in Technical Communication
- 3 The Research Process in Technical Communication
- 4 Providing Audiences with Usable Information
- 5 Recognizing Ethical Issues in Technical Communication

1

Introduction to Technical Communication



CHAPTER OUTLINE

What Is Technical Communication? 3

Who Creates Technical Communication? 4

Main Features of Technical Communication 4

Three Primary Purposes of Technical Communication 8

Common Types of Technical Documents 12

The Importance of Proofreading 15

STRATEGIES for Proofreading 16

CHECKLIST for Effective Technical Communication 17

Applications 17

LEARNING OBJECTIVES FOR THIS CHAPTER

- ▶ Define technical communication
- ▶ Envision how people at work create technical communication
- ▶ Describe the key characteristics of effective technical communication
- ▶ List the primary purposes of technical documents
- ▶ Recognize typical technical documents
- ▶ Proofread effectively

WHAT IS TECHNICAL COMMUNICATION?

Technical communication is the exchange of information that helps people interact with technology, advance workplace goals, and solve complex problems.

We live in a world in which many of our everyday actions depend on complex but usable technical information. When you purchase a cell phone, you immediately turn to the instruction manual. When you install any new device, from a DVD player to a microwave oven to a cable modem or computer, you look for the setup information as soon as you open the box. From banking systems to online courses to business negotiations, countless aspects of daily life are affected by technology. To interact with technology in so many ways, we all rely on technical information that is easy to understand and use. In our daily lives, technical communication answers questions such as these:

- How do I set up my new Web camera?
- Which button on the ATM do I press to obtain my monthly activity summary?
- How do I paste a digital photo into a text document and resize the image?

Definition of technical communication

Technical communication helps us interact with technology in our daily lives

Day-to-day questions

In the workplace, we are not only consumers of technical communication but also producers. People might need information to complete a task, answer a question, solve a problem, or make a decision. Any document or presentation we prepare at work (memo, letter, report, Web page, PowerPoint presentation) should advance the goals of the intended audience. On the job, technical communication might answer questions such as these:

- What is our competition doing and how should we respond?
- What new government regulations should we address?
- What new technology should our company be thinking about?

Technical communication helps advance workplace goals

Workplace questions

Technical information is also used in more specialized settings. For example, a physician performing heart surgery must have clear information about how to install a pacemaker. A government research scientist must have accurate instructions about how to write a grant or how to perform a particular experiment. An engineer must have access to the correct specifications for designing a bridge or configuring a software application. In specialized settings, technical communication answers questions such as these:

- Do the benefits of the Lyme disease vaccine outweigh its risks?
- What are the technical limits to wind energy?
- How effectively will the new heating system circulate in the top floors of the new office complex?

Technical communication helps specialists solve complex problems

Specialized questions

Technical communication differs from most academic writing

In first-year writing (freshman composition) or expository writing, the emphasis typically is on one type of document: the traditional college essay. Technical documents differ from college essays in that they are

- **Reader based:** For a technical document, you research, write, and design your message not from your own personal perspective but according to the needs of your readers. Professors read to *test* your knowledge, but colleagues, customers, and supervisors will read to *use* your knowledge.
- **Task oriented:** Technical documents are typically oriented toward completing a task, filling a need, or solving a problem, rather than supporting a personal stance, as in an academic essay.
- **Context sensitive:** Technical documents are written with the context and situation in mind (e.g., the politics of what’s happening at work or government regulations that affect what the document needs to contain).
- **Design based:** Unlike college essays, which take essentially one shape (paragraphs of text), a technical document may take the form of a brochure, a memo, a report with different sections, a numbered set of instructions, a blog, or a Web site.
- **Written, visual, digital, and oral:** This book refers to “technical communication” and not “technical writing” because *communication* implies more than just words on a page. Technical communication also includes using visuals, working with digital media, and making oral presentations.

As you work on the assignments for this course, the skills you learned in previous writing classes will remain important, but the writing will often be different.

WHO CREATES TECHNICAL COMMUNICATION?

Anyone in a workplace setting can be a technical communicator

Virtually all professionals, at some point, function as technical communicators. Experts in any field are often required to present their knowledge to nonexpert audiences. For instance, the writer of instructions for uploading new software would need to be sure that a general audience could perform the task without having to call a customer service representative; a manager preparing a presentation for a client would need to create clear and concise PowerPoint slides; and a nuclear engineer testifying before Congress would need to write a report explaining nuclear science in nonscientific language to policy makers.

MAIN FEATURES OF TECHNICAL COMMUNICATION

Creating effective documents is at the core of technical communication

Despite the importance of phone calls, face-to-face conversations, and meetings, writing and producing paper and electronic documents remain at the core of technical communication. Such communication is most effective when it displays the features previewed on the following pages and covered in later chapters.

Technical Communication Focuses on the Reader Not the Writer

Unlike poetry, fiction, or essays, technical documents rarely focus on the author's personal thoughts and feelings. This doesn't mean that technical documents should have no personality (or voice), but it does mean that the needs of your readers must come first. Users of technical communication are only interested in you, the communicator, to the extent that they want to know what you have done, what you recommend, or how you speak for your company or organization. This type of communication is called "user-centered communication" (see Figure 1.1). User-centered communication requires a focus on the people who will be *using* the document. What do your readers need to know? What tasks are they trying to perform?

Produce user-centered documents

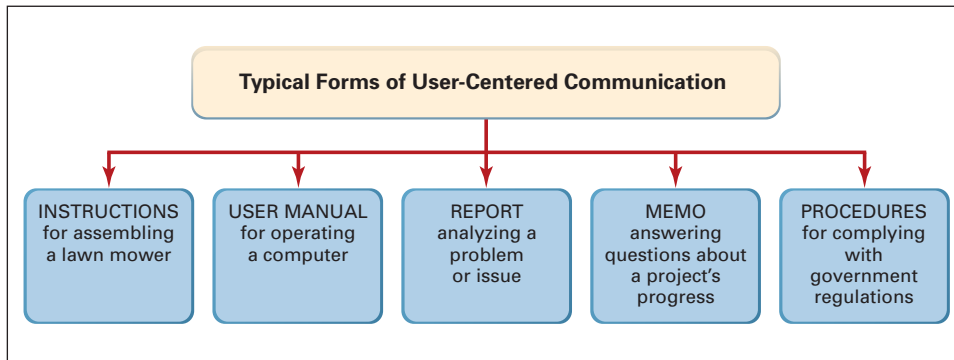


FIGURE 1.1
User-centered communication

Placing the reader's needs and interests first takes practice because many of us are taught to write from our own perspectives. For instance, assume you've been asked to create a set of instructions that explain how people in the community can bring household hazardous waste (gasoline, paint) for recycling. Assume also that you live in the neighborhood near the recycling center and often visit that location. In this instance, you could easily forget to include a map and directions to the center, unless you focus consistently on your actual readers—people who are new in town, people who don't live close to the facility, and so on.

Learn to put yourself in the reader's place

Technical Communication Is Efficient and Accessible

When technical communication is efficient and accessible, users can actually find the information they need and get their questions answered quickly. For instance, in the bioremediation document (Figure 1.3, page 9), a scientific topic is presented so that the general public can make sense of it.

Produce documents that are easy for readers to use

People using a technical document often go back and forth: instead of reading from beginning to end, they look up the information they need at a particular

Make documents easy to navigate