

# TECHNICAL

# COMMUNICATION

## A READER-CENTERED APPROACH

NINTH EDITION



# PAUL V. ANDERSON

# TECHNICAL COMMUNICATION

*A Reader-Centered Approach*

NINTH EDITION

PAUL V. ANDERSON

Miami University (Ohio)



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Australia • Brazil • Mexico • Singapore • United Kingdom • United States

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## FOR MY FAMILY

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Christopher and Kirsten

Soren and Sigrid

Rachel and Jeff

Anderson

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Mom and Dad

## AND FOR MY TEACHERS

James W. Souther and Myron L. White





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# PREFACE FOR INSTRUCTORS

Welcome to the Ninth Edition of *Technical Communication: A Reader-Centered Approach*. This edition, like the previous ones, has a single central goal: to help you prepare your students to write effectively in their careers. Once again, I am deeply indebted to the generous suggestions of instructors and students—my own and others.

## Key Features

While this edition includes many new features, it retains the features that instructors and students have found most helpful.

**Reader-centered approach.** No matter what your students' future (or current) careers, their success as writers will depend on the responses they are able to elicit through their writing from their readers. But people at work differ from one another, just as they do in the rest of their lives. To write effective on-the-job communications, students will have to learn about their specific readers and use that knowledge to create communications that these particular persons will find helpful and persuasive.

The book's advice and examples apply this reader-centered approach, whether focusing on content, organization, and other large issues or on the smallest details of sentence construction and table design.

**You at the center.** Unlike the many textbooks that, by implication, put you in the secondary role of teaching what they say, this book places you at the center of your course. It emphasizes the many indispensable ways you contribute to your students' learning—that your knowledge of your students and their career plans enables you to choose what parts of the book to cover, what to emphasize, and even what to disagree with. It also highlights your ability to give something a book cannot: individualized guidance and feedback.

**Support for the course you design.** The book's broad coverage and simple, three-part design enable you to choose the topics, assignments, and course design that will best prepare your students with sophisticated yet transferable skills they can use wherever they choose to work after graduation. The book's "Writer's Planning Guides" and "Checklists," its "Libraries of Projects and Cases," and many of its other resources can be downloaded in Word so you can tailor them to your course.

**In-depth coverage in an easy-to-learn manner.** In most chapters, the major points are distilled into easy-to-remember guidelines whose implications and applications are then elaborated. The guidelines themselves reinforce one another because they all flow from a common set of reader-centered principles and processes.



**Numerous richly annotated examples and sample documents.** To students, guidelines can be mere abstractions accompanied by concrete examples illustrating their application. Throughout, the book includes sample communications with annotations that illustrate the use of its advice. Moreover, these annotations focus on the writer's purpose, thereby drawing students' attention to the writer's reader-centered decisions and strategies.

### **New to This Edition**

Of course, this new edition offered me a welcome opportunity to refine, update, and respond to new developments in technical communication research and practice. It is also an opportunity to act on recent suggestions from instructors and students. Consequently, this edition includes the following new features.

- **New chapter on “Writing Effectively on Social Media at Work.”** Many organizations have learned that social media can increase efficiency—if used in a business-oriented way. This new chapter builds on what students already know about social media and explains how workplace uses of social media differ from their social uses. Several other chapters elaborate on special uses of social media at work.
- **Integration of transfer of learning.** Research over the past two decades demonstrates how difficult it can be for students to adapt and apply what they learned in college to the writing they do on the job. However, more recent research has also uncovered strategies for increasing the transfer of learning to novel situations. Building on this research, Chapter 1 introduces the importance of learning in ways that promote transfer. “Reflect for Transfer” exercises are included at the end of many chapters. A new Appendix B presents reflection assignments you can ask students to complete when they turn in their finished projects.
- **New section of creating professional portfolios in Chapter 2, “Overview of the Reader-Centered Approach: Writing for a Job.”** Professional portfolios have become an important, widely used supplement to résumés and job application letters. Chapter 2 also includes a new discussion of the importance of creating a positive presence in social media, which, research shows, most employers check before making job offers.
- **Simplified organization.** To increase flexibility for your teaching and enhance student learning, the book's overall organization has been modified from nine parts in the previous edition to three. Also, the order and content of some chapters are revised. Details are provided below, in the section titled “Organization of this Edition.”
- **Streamlined presentation.** When I asked engineering and science students how I could improve this edition, they told me to retain its central features but also suggested several revisions. Their strongest advice was to “Eliminate repetition, redundancy, and things we already know.” (See the acknowledgments.) Looking at my text in light of their advice enabled me to create a book that is significantly shorter and sharper, even though it contains additional material.
- **Increased attention to building on what students already know.** The goal is to help students adapt and build on the writing and speaking skills they bring to the course.



- **Chapter 3, “Defining Your Communication’s Goals,”** is shortened to emphasize more emphatically its key advice for learning what readers want and what will influence their attitudes and actions.
- **Chapter 4, “Conducting Reader-Centered Research,”** includes new discussions of “What Counts as Good Research in the Workplace?” and ways to conduct research that meets those criteria.
- **Chapter 5, “Using Six Reader-Centered Research Methods,”** adds a new section on “Using Social Media in Your Research.”
- **Chapter 6, “Organizing Reader-Centered Communications,”** is reconstructed to present its advice in a crisper, more engaging manner.
- **Chapter 7, “Drafting Reader-Centered Communications,”** presents more comprehensive advice by supplementing the guidelines on organizing the body of a communication with advice on drafting its beginning and ending, which had previously appeared in separate chapters.
- **Chapter 9, “Persuading Your Readers,”** extracts, revises, and relocates in a more logical place advice from the previous edition. The supporting research is updated.
- **Chapter 11, “Writing Reader-Centered Front and Back Matter,”** includes new examples that provide more helpful guidance to students.
- **Chapter 15, “Revising Your Drafts,”** includes a new discussion on revising social media messages at work.
- **Chapter 17, “Creating Communications with a Team,”** replaces earlier sections with new advice based on the latest research, including a five-year study of 180 teams by Google.
- **Appendix A, “Documenting Your Sources,”** includes the new, substantially different (and improved) MLA style, as well as the current APA and IEEE styles.
- **Appendix B,** which is also entirely new, presents “Reflecting for Transfer” assignments that are designed for use by students when they turn in course projects.

## Other Major Features

In addition to the major preserved features already named, I have also kept the following because instructors have told me that they increase the book’s breadth and effectiveness for teaching and learning.

- **Writer’s Tutorials.** The tutorials demonstrate ways students can achieve some of the outcomes described in the text—for instance, by guiding students step-by-step through certain processes. Some are included in the text (see pages 33–35 and 352–354 for examples), and others are accessible in MindTap.
- **Planning Guides and Revision Checklists.** Integrated at key points in the text, they assist students in applying the book’s advice as they work on their course projects. Additional ones are available in MindTap. As mentioned above, all can be downloaded in Word so you can modify them to your specific course and assignments.
- **Careful attention to international and intercultural communication.** Global Guidelines, integrated into the chapters, help students learn the

many ways that cultural differences affect communication and provide concrete suggestions for increasing their effectiveness in cross-cultural communications.

- **Marginal notes to extend learning.** Three categories of marginal notes summarize major principles, provide cross-references among chapters (“Learn More”), and challenge students to apply key strategies to their own experiences (“Try This”).
- **Continuous attention to ethics.** Chapter 1 introduces the topic of ethics in technical communication. Ethics guidelines are integrated into the chapters, so ethics becomes a continuous topic throughout a course rather than the topic for one day’s reading. In addition, most chapters include special exercises that focus on ethical issues particular to the topic of those chapters.
- **“Use What You’ve Learned” exercises.** At the end of most chapters, four types of exercises promote students’ ability to apply the book’s advice: “Apply Your Expertise,” “Explore Online,” “Collaborate with Your Classmates,” and “Apply Your Ethics.” In addition, “Reflect for Transfer” exercises challenge students to think about ways they could use what they have learned in a chapter when writing on the job.

## Organization of this Edition

I have simplified the organization of this edition to make it easier for you to select the order in which you want to use the chapters and to provide you with a clearer way to explain to your students the relationships among the chapters you’ve chosen.

- **Introduction.** Part I includes two chapters. Chapter 1 can help you explain the nature of writing in the workplace and the ways it differs from most (or all) the writing students do in other courses. Chapter 1 also introduces the reader-centered approach as well as the book’s approach to ethics and the transfer of what students learn in your course to the writing they will do on the job.

I include Chapter 2, which focuses on writing for a job, in the introduction because it helps students see in a very personal way why thinking about their reader at every point in the process is the key to writing workplace communications that achieve the results they want. However, other instructors enjoy equal success assigning writing for a job at another point in their courses or not at all.

- **The Reader-Centered Communication Process.** Part II helps you provide your students with reader-centered guidance for each of the major activities in the technical communication process, beginning with defining the goals for their communications through researching, organizing, drafting, and revising. Four chapters focus on skills that are especially important in technical communication but not most other writing courses: creating graphics, crafting page designs (two chapters), and user-testing drafts.

Most instructors (including me) assign these chapters out of order. As students are working on each course project, we select the chapters from Part II whose content students learn most effectively by applying it to that project.

- **Applications of the Reader-Centered Approach.** Part III includes a variety of chapters from which you can choose the ones that, based on your



knowledge of your students and their career plans, will most help them develop and learn to apply their reader-centered knowledge and skills. These chapters provide detailed advice for communicating in a variety of workplace writing situations, such as writing with a team, writing correspondence, and writing on social media. They also guide students in preparing five major workplace superstructures (genres): proposals, empirical research reports, feasibility studies, progress reports, and instructions. Downloadable projects involving these applications are available in MindTap as Word files, so that you can modify them to suit your particular course and students.

I've also included two appendices. Appendix A is a reference resource that explains how to use the APA, IEEE, and MLA documentation styles. Appendix B includes Reflecting for Transfer activities you can ask students to complete when they turn in their course assignments.

## Supporting Materials for Students and Instructors

On CengageBrain.com students can save on their course materials through our full spectrum of options. Students have the option to rent their textbooks, purchase print textbooks, e-textbooks, individual e-chapters, and audio books, all for substantial savings over average retail prices. CengageBrain.com also includes access to Cengage Learning's broad range of homework and study tools.

### MindTap® English

MindTap is a digital learning solution that helps instructors engage students and transform them into critical thinkers. Each MindTap course also comes with a selection of apps to encourage interactivity, engagement, personalization, and more.

MindTap for *Technical Communication*, Ninth Edition includes:

- **MindTap® Reader eBook.**
- **Aplia homework.** Aplia significantly improves outcomes and elevates thinking by increasing student effort and engagement.
- **InSite.** InSite from Cengage Learning is a full integrated, productivity-enhancing classroom solution that delivers an all-in-one perspective on your students' work.
- **Questia.** Access a vast library of books and articles that instructors can add to the course learning path or eBook and students can use to research.
- **NetTutor®.** NetTutor is staffed with U.S.-based tutors and facilitated by a proprietary whiteboard created for online collaboration in education.
- **Library of Case Studies.** Referenced in several text chapters, Case Studies help students hone their reader-centered communication skills. Some Case Studies are suitable for homework or class discussion; others are appropriate for course projects.
- **Library of Projects.** The Library of Projects provides instructors with a wider selection from which to choose assignments that are most appropriate for their students.
- **Additional annotated sample documents.** These model reader-centered communication in a realistic format.
- **Downloadable and customizable Planning and Revision Guides.** These help students navigate the process of creating many kinds of communication.

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- **Additional Writer's Tutorials.** These guide students step-by-step through certain communication processes.
- **Style Guide.** This provides brief, user-friendly guidance on issues of grammar, punctuation, style, and usage.
- **Web Resources.** These direct students to additional online tools and technical communication sites of interest.
- and more!

### Instructor's Manual

Accompanying this edition of *Technical Communication: A Reader-Centered Approach* is an updated instructor's manual that includes a thorough introduction to the course, information on how to integrate supplemental materials into the class, advice on teaching the exercises and cases in the textbook, and more. Instructors may download a PDF version from MindTap or from the Instructor Resource Center.

### Author's Acknowledgments

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**PAUL V. ANDERSON**

Miami University  
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## **PART I**

# INTRODUCTION

- 1** Communication, Your Career, and This Book **2**
- 2** Overview of the Reader-Centered Approach:  
Writing for a Job **20**

# 1

## Communication, Your Career, and This Book

### LEARNING OBJECTIVES

1. Describe the major ways writing at work differs from writing at school.
2. Name and explain the two qualities that writing at work must have to be effective.
3. Summarize in one sentence the reader-centered approach to writing.
4. Use six reader-centered strategies when writing a brief communication.
5. Describe this book's approach to ethics.
6. Tell how to gain lasting value from your course and this book.

### MindTap®

Find additional resources related to this chapter in MindTap.

College graduates typically spend one day a week—or more—writing.

2

From the perspective of your professional career, communication is one of the most valuable subjects you will study in college.

Surprised? First, consider what employers will be looking for when reading your application for an internship, co-op, or full-time position. At one time, many employers may have focused primarily on the specialized skills you learned in your major. But the world has changed.

In a survey that asked 225 U.S. employers to identify the top qualifications they seek in new employees, the highest number (98%) identified communication skills (Schawbel, 2012). When 400 employers were asked in another survey to identify the most important outcomes of a college education, they listed *communicating effectively in writing* and *communicating effectively orally* as two of the top three (Hart, 2015). The third? *Working effectively with others in teams*, an ability that also depends heavily on communication skills.

There is every reason to believe that similar results would be obtained in other countries. In India, executives of one of the world's largest software consulting companies told me that when hiring new college graduates their company always ranked communication ability above computer skills.

Although employers value communication skills so highly, they are frustrated by the writing skills that most new college graduates bring to the job. Of the 400 employers who ranked writing and speaking effectively at the top of their list of desired skills, only 1 in 4 said that college graduates are well prepared in writing (Hart, 2015). U.S. corporations spend more than \$3 billion annually on writing instruction for their employees (National Commission on Writing, 2004).

The gap between what employers want and the qualifications they see in job applicants means that you can prepare yourself to stand out from other applicants by developing your communication expertise.

### Communication Expertise Will Be Critical to Your Success

Your communication abilities will continue to be important after you are hired. Writing alone will consume a major part of your time. Newly hired employees spend an average of 20 percent of their time at work writing (Beer & McMurrey, 2009; Sageev & Romanowski, 2001). That's one day out of every workweek! And it doesn't include the time they spend talking in person, on the phone, or on the Internet, whether in person or in meetings. Writing ability will also be a major consideration when you apply for promotions, according to the U.S. National Commission on Writing (2004).



Besides being essential to your career, communication expertise will enable you to make valuable contributions to your campus or community. Volunteer groups, service clubs, and other organizations will welcome your ability to present their goals, proposals, and accomplishments clearly and persuasively.

If you enjoy writing and learning about computers, health, engineering, or similar fields, technical communication could become your profession. Private corporations, nonprofit organizations, and government agencies the world over hire professional technical writers and editors. In the United States, technical writing has been rated as one of the top fifty jobs, based on employee satisfaction and projected number of job openings through at least 2020 (Wolgemuth, 2010).

## Learning Objectives for This Chapter

Your instructor and this book share the goal of helping you develop the communication expertise needed to realize your full potential on the job and in your community. This chapter and class discussions of it will build the foundation for the rest of your course. As you read and discuss the chapter, focus on learning how to achieve the learning objectives listed on the chapter-opening page. You might imagine that your instructor will give a quiz asking you to do one or more of them.

## Characteristics of Workplace Writing

How can students who wrote well and received high grades in school be perceived as poor writers by their employers? Researchers found that the answer is quite simple. The writing done on the job differs in substantial ways from the writing learned in school—and the transition from one type to the other can be difficult. What’s valued most highly in school is not what is required of writers at work. In addition, workplace writing involves many new skills not usually taught in college. Your instructor and this book share the goal of giving you an enormous head start on making that transition.

To begin, let’s look at what makes writing at work so different from writing at school. First, we need to acknowledge that it won’t be completely different. Good grammar and correct spelling still matter. So do many other communication skills you already know. But you will have to adapt much of what you know, for instance how to use social media, in order to use it in what many employers call a “professional” way. And, of course, there are some completely new things for you to learn, such as how to write types of communications you’ve never written before.

The following sections describe seven important ways workplace writing differs from most college writing—starting with the most crucial of them all.

- It serves **practical purposes**.
- It must satisfy a **wide variety of readers**, sometimes in a single communication.
- It uses **distinctive types of communication**.
- It is **shaped by context**.
- It must **adhere to organizational expectations**.
- It is frequently **created collaboratively**.
- It **uses social media** for practical purposes.

### Serves Practical Purposes

The most important difference between the writing you will do at work and most of the writing you do in school concerns *purpose*. On the job, you will write for practical



purposes, such as helping your employer improve a product or increase efficiency. Your readers will be supervisors, coworkers, customers, or other individuals who need information and ideas from you in order to pursue their own practical goals. You may already have prepared this type of communication for instructors who asked you to write to real or imagined readers, people who need your information in order to make a decision or take an action.

Most of your school writing—term papers, essay exams, and similar school assignments—has a much different purpose. It is intended to help you learn and to demonstrate your mastery of course material. Although your instructors will read what you write in order to assess your knowledge and decide what grade to assign, they rarely, if ever, need information and ideas from you in order to guide their decisions and actions as they pursue their own goals.

In contrast, communication is the lifeblood of an organization. It is the flow of ideas and information that delivers what you know or have found out to another person who needs your information to do his or her job.

- Sarah, a recent college graduate in metallurgy, discovered the reason that the pistons in a new, lightweight, fuel-saving automobile engine broke in a test. However, her discovery has no value to her employer unless she communicates her finding in a clear and useful way to the engineers who must redesign the pistons.
- Larry, a hospital nutritionist, developed ideas for improving the efficiency of the kitchen where he works. However, the hospital will reap the benefits of his creativity only if he presents his ideas persuasively to the people with the power to implement these changes.

Different purposes profoundly affect the kind of communication you need to produce. For an essay exam or term paper, your purpose is to show how much you know. You succeed by saying as much as you can about your subject. At work, where your purpose is to help your readers make a decision or perform a task, you succeed by telling your readers only what they need, no matter how much more you know. Sarah doesn't need to tell the design engineers everything she learned about the broken pistons. In fact, she shouldn't. She should communicate only the information that will help the engineers make better ones. Extra information will only clog their paths to what they require in order to do their work.

Learning what your readers need and determining the most *helpful* way to present this information are the most critical skills in workplace writing, though they are not relevant for most writing assigned at school. This book and your instructor will help you learn to make this critical transition from school writing to workplace writing.

### **Must Satisfy a Wide Variety of Readers, Sometimes in a Single Communication**

As a student, you usually write to a single reader, your instructor. In contrast, at work, you will often prepare communications that address two or more people who differ from one another in important ways, such as their familiarity with your specialty, the ways they will use your information, and their professional and personal concerns. For example, in his report recommending changes to the hospital kitchen, Larry's readers may include his supervisor, who will want to learn how operations in her area would have to change if Larry's recommendations were adopted; the vice president for finance, who will want to analyze Larry's cost estimates; the director of personnel, who will want to know how job descriptions would need to change; and members of the labor union, who will want assurances that the new work assignments will treat employees fairly.



On the job, you will often need to construct communications that, like Larry's, must simultaneously satisfy an array of persons who will each read it with his or her own set of concerns and goals in mind.

Also, at work, you may often address readers from other nations and cultural backgrounds. Many organizations have clients, customers, and suppliers in other parts of the world. Thirty-three percent of U.S. corporate profits are generated by international trade (Lustig & Koester, 2012). The economies of many other nations are similarly linked to distant parts of the globe. Corporate and other websites are accessed by people around the planet. Even when communicating with coworkers at your own location, you may address a multicultural audience—persons of diverse national and ethnic origins.

**LEARN MORE** To learn about addressing international and intercultural audiences, read the Global Guidelines included in many chapters.

## Uses Distinctive Kinds of Communication

At work, you will create a wide variety of job-related communications that aren't usually prepared at school. Depending on your career, these may be business letters and emails, memos, project proposals, instructions, and progress reports. Each type has its own conventions. In your course, you will study and gain experience writing some of these types (Chapters 20–27), and you will develop strategies for learning about and successfully writing others.

Also, at work, writing involves more than words. In many communications, graphics such as tables, charts, drawings, and photographs are as important as the written text. Equally important, you can make reading easy for your readers by the ways you arrange text and graphics on the page or screen. Figure 1.1 shows a page from an instruction manual that illustrates the importance of graphics and visual design. Chapters 12, 13, and 14 teach you how to create graphics and design pages that your readers will praise.

## Shaped by Context

Every communication situation has social dimensions. In your writing at school, the key social relationship usually is that of a student to a teacher. At work, you will have a much wider variety of relationships with your readers, such as manager to subordinate, customer to supplier, or coworker to coworker. Sometimes these relationships will be characterized by cooperation and goodwill. At other times, they will be fraught with competitiveness as people strive for recognition, power, or money for themselves and their departments. To write effectively, you will need to adjust the style, tone, and overall approach of each communication to these social and political considerations.

The range of situational factors that can affect a reader's response is obviously unlimited. The key point is that in order to predict how your readers might respond to a communication, you must understand thoroughly the context in which they will read it.

## Adheres to Organizational Expectations

Each organization has a certain style that reflects the way it perceives and presents itself to outsiders. For example, an organization might be formal and conservative or informal and progressive. Individual departments within organizations may also have their own styles. On the job, you will be expected to understand the style of your organization or department and employ it in your writing.

Another important expectation concerns deadlines. At work, they are much more significant—and changeable—than most deadlines at school. A deadline may be pushed back or advanced several times during a project, but no matter what the deadline is, the work must be completed on time. For example, when a company prepares a proposal or sales document, it must reach the client by the deadline the client has set.