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## UNIT 1

# Introduction to workplace writing

# In this unit, you will learn: the importance of workplace writing; some typical characteristics of workplace writing; some common types of workplace documents; a few ways to make your workplace writing effective.





You may not like writing, and much less workplace English writing, but believe it or not, a good training in workplace English writing will prepare you for your future career if you ever want to work for a foreign or multi-national company after graduation, or if you ever want to further your studies or seek career opportunities in an English-speaking country.

In today's globalized world, a good command of English communication skills in both written and spoken forms has become a necessity rather than a rarity in the world of work. For example, in order to find a job after graduation, you will need to create a strong résumé and a job application letter to convince a potential employer that you are the best candidate for a job opening. Once you have entered the

workplace, you will very likely be required to write English emails, short or long reports, or to give PowerPoint presentations about the projects you have been working on. This is not only true for people working in international or foreign firms in China, but also for employees of Chinese companies that do business or interact with international customers, clients, or organizations.

Qing, a college graduate majoring in insurance who has worked for eBaoTech in Shanghai, a leading provider of insurance software and services for life and general insurance worldwide, has this to say when interviewed about English writing at work.



**Qing**eBaoTech,
Shanghai

#### – What is your position in the company?

At first, I was a Business Analyst, very similar to the position of a consultant. My
major responsibility was to communicate with our clients to understand their
business operational models and what systems they need. I would then put
everything in a written document and pass it on to a colleague so that he / she could
develop the system our clients need. I also took care of after-sale maintenance and
improvement of our products.

I am now a Project Manager, taking charge of the project planning and allocation of specific tasks to make sure that each project is successfully completed and completed on time.

- How much written communication between you and your colleagues / superiors is carried out in English?
- Our written communication is mostly done through emails, and it's always in English. Oral communication is in Chinese.
- What kinds of documents do you create in English?
- Emails, business specifications, project plans, reports, and other documents.
- Roughly how much time do you spend on English writing tasks every day?
- About 40% of the time at work, but that's not always the case, as it may vary
  depending on which stage of project implementation we are at. There is more
  writing at the beginning of a project but less at later stages when my major
  responsibility is supporting customer tests / trials.

Needless to say, spending about 40% of one's time at work on English writing is enough to show the importance of English writing abilities in the workplace.

In another example, if you are the branch office manager of a foreign company doing business in China, you will probably be writing monthly, quarterly, and annual reports, in English, to the company headquarters. You may also find yourself in a position to write a proposal to implement a new sales strategy, to expand customer service, or to reward high-performance employees. Or, as the secretary to the dean of a certain university in China who is organizing an international conference, you will surely find yourself drafting proposals, schedules, brochures, a call for papers, etc. during the whole process. Your ability to create all such documents in a professional way, in English, will not only enable you to stand out in the crowd in your job application, but also put you on a fast track in your career path.

This book will focus on the writing aspect of workplace communication. You will soon learn that you need to consider things from the reader's perspective when writing at work. The reader's needs will determine what information you should include in a workplace document and how you should organize and present such information to achieve your goal.

#### **ACTIVITY 1**

- What kinds of documents do you think are often created in the workplace? Add everything you can think of to the first one listed below.
  Emails,
- 2 Now compare your list with the one provided in the Types of workplace documents section of this unit. How many items you came up with are mentioned in this unit's list? If your answer is three or more, congratulations!

# Characteristics of workplace writing

Workplace writing has the following typical characteristics:

- lt always has a purpose;
- It contains specific / specialized information;
- It has a readily recognizable format;
- It has a specific reader;
- It usually goes through a process;
- It is sometimes carried out in teams;
- lt is often cross-cultural.

#### 1 Workplace writing always has a purpose

Every workplace document has a specific purpose to achieve. For example, while an email from the management of a company to its employees regarding changes to its overtime compensation policy is to notify or inform all email recipients about that change, a brochure you pick up at a doctor's office entitled "Understanding and controlling high blood pressure" is to educate its readers.

In general, a workplace document may have one (or sometimes more than one) of the following purposes:

- to inform
- to instruct
- to persuade
- to apply
- to request
- . . .

- to explain
- to analyze
- to propose
- to report

You will learn throughout the book that knowing and defining the specific purpose of a document will help you create a document that can achieve the desired outcome of your writing task. Go back to the above described scenario where the management of a company emails its employees to inform them about changes to its overtime compensation policy. It is expected that the employees will understand the new overtime compensation scheme after reading a clearly-written email. Then the email's purpose of informing is successfully achieved.

#### **ACTIVITY 2**

Decide the main purpose(s) and desired outcome of each of the following workplace documents. Write your answers in the blanks provided.

Example: A grant proposal

Purpose: to request and to persuade; Desired outcome: to get requested funding

- (1) The assembly instructions of a shoe cabinet
- (2) A scientific paper published in an academic journal
- (3) A professional-looking résumé and job application letter
- (4) A progress report of a project

## **2** Workplace writing contains specific / specialized information

Workplace writing usually contains specific and sometimes specialized content about the topic it addresses. For example, a sales letter of a notebook computer targeting at college students and other young adults may contain certain technical information about the computer's outstanding features (such as what processor it uses, how much RAM it has, what graphics come with the computer, etc.) as well as a competitive price. An educational brochure about how to drive at a roundabout will provide accurate, correct, and expert-level information about roundabout traffic rules, signs, as well as actions that need to be taken to ensure safe driving. Even a simple job application letter will call for good knowledge about a prospective employer, the organization, and the potential job opening one is applying for.

#### 3 Workplace writing has a readily recognizable format

Although most workplace documents share some common features (such as a basic overall structure of introduction-body-conclusion, which we will discuss in more detail in Unit 2), different types of workplace documents do follow their own recognizable formats in terms of what information should be included and how the information is organized. For example, due to the distinctive formats, a proposal will look very different from a set of instructions, an abstract will never be mistaken for a lab report, and a business letter will unlikely be taken as a memorandum. Units 5-10 of this book will examine the specific formats of six selected types of workplace documents frequently used in today's workplace.

#### **ACTIVITY 3**

- 1 Based on common-sense knowledge, you probably know that emails usually contain the following elements:
  - the "From" line;
  - the "To" line;
  - the "CC" line (optional);
  - the "Subject" line;
  - a greeting (if appropriate);
  - the body of the email (information about what, why, when, where, how, etc.);
  - a closing (your name with or without an electronic signature).

Now please search for a sample of the following types of documents (either at home for a hard copy or online for an e-copy), and identify the major elements of each sample by following the example above, noting down the basic elements of each in the blanks provided.

(2) A set of simple instructions:
(3) An incident report:
Are there obvious differences in the format of the three types of workplace documents? If so, describe the differences below.

#### 4 Workplace writing has a specific reader

Unlike writing at school where your teacher / professor is often the main reader of what you write, in a workplace setting, every document is created for some specific target readers. For example, a quick set-up guide that comes with a new washing machine is mainly written for people who have purchased such a product and will consult the guide to set up and use the machine.

A workplace document can be written and designed very differently depending on who the main target reader is. For more details about target readership, please refer to Unit 3 of this book.

-	CT			
		-	/ -	 

The following is an email from Tom	n, a company employee,	to Jeff, one	of Tom's colleagues
------------------------------------	------------------------	--------------	---------------------

Hey, Jeff,

The presentation you gave at our group meeting yesterday was awesome. Can you send me a copy of your PPT slides? Thanks.

Tom

Imagine that Tom is writing the same email to Daniel, CEO of the company. This change of target readership should affect the way the email to be written.

- (1) Revise the above email, taking the new target reader Daniel's relation with Tom into consideration.
- (2) List 2-3 changes you made and explain why such changes are necessary.

Change 1:

Change 2:

Change 3:

#### 5 Workplace writing usually goes through a process

The task of writing a workplace document is not a single activity. Instead, it usually goes through a process of three major stages:



Figure 1.1 The workplace writing process

During the planning and researching stage, the writer should try to determine the purpose, objective, target readers and their needs, and the scope of content of a workplace document. Research will then be carried out to gather relevant information and data on the topic of the document for him / her to prepare for the drafting task.

#### **ACTIVITY 5**

Suppose you work at the County Office of Complaints. For the past few months, you have received numerous letters, calls, and visits from retail shop owners who complain that their businesses located in street-side plazas have been severely affected by security guard stations the county set up throughout the town a few months ago. These business owners claim that the security guard stations, standing right in front of their stores, block pedestrian shoppers' views of their stores, causing their businesses to lose tens of thousands of dollars each month. If the security guard stations are not removed, the shop owners will inevitably go out of business soon. You have been assigned to investigate the case, write a report about it, and then submit it to the county administration to decide whether the security guard stations should be removed.

In groups of three or four, brainstorm on and determine the following aspects of the investigation report. Make a list of ideas your group comes up with and share the list with the other groups in class.

- The purpose;
- The objective;
- The target reader;
- The target reader's needs;
- The contexts of document use.

The drafting stage is when you start creating an outline for and then drafting the document after you have sorted out and made sense of the information and data you have gathered during the planning stage. You will need to know and follow the typical structure of the genre of workplace document you are creating to achieve the purpose of your writing. For example, a set of instructions will be organized very differently from a scientific paper, so make sure you study the second part of this textbook carefully to learn more about the six common types of workplace documents discussed.

#### **ACTIVITY 6**

Continue your investigation project described in Activity 5, and make an outline for the investigation report using 3-4 appropriate ideas selected from the brainstormed list you came up with in Activity 5 (Please refer to Unit 2 for details about how to do outlining).

The revising and editing stage is very important as it ensures that the document has been written in a professional, readable, and user-friendly way to achieve its intended purpose and objective.

How extensively and thoroughly a job is to be done depends on the time available. Revisions and editing can be made whenever you think it is needed before the document is sent out.

The double arrows between the stages in Figure 1.1 indicate that the three stages of the workplace writing process are not independent of one another. On the contrary, someone who works on a workplace document is very likely to move back and forth between the stages. For example, during the drafting stage, the writer may realize that the information gathered during the planning and researching stage is not sufficient and that some more examples are needed to better illustrate a point. In that case, the writer will go back to the planning and researching stage to carry out more research. On the other hand, a writer may

revise and edit what has been written during the drafting stage, thus going back and forth between the drafting and revising / editing stages.

Unit 2 will explain the workplace writing process in greater detail. Depending on the type, scope, and difficulty level of a workplace document, you may need to go through some or all of the steps of the three stages, so make sure you read Unit 2 carefully.

#### **6** Workplace writing is sometimes carried out in teams

Nowadays producing a workplace document often requires multiple skills and interdisciplinary expertise. For instance, preparing a grant proposal to conduct research on the functionalities of complex electronic materials will necessarily involve participation by and contribution from scientists specializing in materials science, chemistry, modeling and simulation, and engineering. It is, therefore, relatively rare for someone to complete such a workplace writing task single-handedly. Learning how to do teamwork has thus become increasingly important.

#### **ACTIVITY 7**

Now imagine yourself creating a brochure about a non-profit organization you work for. The organization has four branches: the management team, the program team, the fundraising and outreaching team, and the book-keeping team. Can you create the brochure all by yourself? Whom else will you likely get help from? Make a list of all the people who can contribute to the project in one way or another.

#### 7 Workplace writing is often cross-cultural

Computers and the Internet have made the workplace almost borderless. Looking around, you may find your co-workers come from different parts of the world, speak different languages and have their own cultures and customs. In addition, more and more companies are setting up offices and manufacturing plants in multiple countries and selling their products all over the world. This makes it necessary for everyone engaged in workplace communication to become cross-culturally proficient and sensitive as differences between cultures may have great impact on what information should or should not be included in a workplace document and how information should be presented, as people from different cultures will read the same workplace document from different cultural perspectives.

For instance, a noticeable difference between the Chinese culture and American culture lies in their writing styles. While Americans usually state their purpose and main point upfront in their writing (such as "I am writing to apply for the position of ..." at the beginning of a job application letter), Chinese writers tend to delay their main point until a social rapport is established or enough reason is given. This indirect, beat-around-the-bush writing style preferred in the Chinese and other Asian cultures may very likely frustrate and baffle readers from North America, where people are used to a more direct style.

#### **ACTIVITY 8**

Can you think of any other differences between Western cultures and the Chinese culture in their writing styles? If so, describe the differences below.



# Types of workplace documents

The most common types of workplace documents in our daily work include:

- emails, letters, and memorandums;
- résumés and job application letters;
- instructions and procedures;
- proposals;
- informal reports (such as lab reports, incident reports, progress reports, meeting minutes, etc.);
- formal reports (including scientific papers);
- abstracts and executive summaries;
- web pages;
- PowerPoint presentations;
- publicity / marketing materials, such as brochures, flyers, posters, etc.

In the second part of this textbook, we are going to discuss letters and memorandums, résumés and job application letters, abstracts and executive summaries, instructions, informal reports, and proposals. We will apply the workplace writing principles discussed in the first four units to these selected workplace document types.

#### **ACTIVITY 9**

How many of the above-mentioned types of workplace documents have you seen before? In English or in Chinese? Search around to find as many such workplace documents as you can, in both English and Chinese. Which type of workplace document is most readily available in our everyday work? Which ones are more difficult to find? Share your findings with your classmates.

#### Ш.

# Ways to make workplace writing effective

As mentioned before, each workplace document has its own distinctive purpose. In order for your document to successfully achieve its intended purpose, you must make your workplace document effective. Specifically, you need to make your workplace document:

- reader-centered;
- concise;
- precise;
- linguistically correct;
- visually clarified;
- easily accessible;
- linguistically and technically appropriate;
- well-suited for the channel of delivery.

#### 1 Make your workplace writing reader-centered

Readers or audiences (two terms that will be used interchangeably in this book) play a pivotal role in workplace writing. This is because the reader of a workplace document is often expected to take an action or make a decision after reading a document. As a result, the writer needs to make sure the reader understands all the necessary information he / she needs.

For example, the reader of a grant proposal needs to decide whether the writer should be granted the money, time, or whatever is requested in the proposal to carry out what he / she proposes to do; a recruiter who spends time reading a résumé and job application letter is supposed to decide whether the applicant should be offered the job; and someone who is consulting the quick set-up guide of a printer is expected to be able to set it up correctly and start using it. A workplace document will fail to achieve its purpose if the reader fails to accomplish what he / she is expected to do.

#### **ACTIVITY 10**

- 1 To make sure a workplace document achieves its purpose, the writer needs to ask some specific questions about the target readers BEFORE any writing takes place. Please add at least 2-3 additional questions about the target readers in addition to the questions below.
  - Who are the target readers of the document?
  - Why do they need to read the document?
  - What information do they need to get from your document in order to take a desired action or make a desired decision?
- 2 In groups of three or four, compare the additional questions each person comes up with, and discuss why these questions are important.

Answers to questions listed in Activity 10, such as what information should be included in a document and how the information should be presented will direct the way a document to be created. For example, if we know that a set of instructions about how to make a PowerPoint presentation is going to be written for elementary school students, then apparently we will have to use simpler and easier-to-understand language and more graphics than if the same instructions are written for adult learners. In other words, everything about workplace writing is centered on the needs of the reader.

#### 2 Make your workplace writing concise

Another element of effective workplace writing is conciseness in both content and linguistic form.

In terms of content, a workplace document should only contain what the reader needs: nothing more, nothing less. In other words, even you, the writer of a workplace document, know everything about the subject of a document, i.e. its history, development, etc., you should still only include the need-to-know information (i.e. information the reader needs to know to take an action or make a decision) and avoid providing any want-to-know information (i.e. information you want the reader to know even though he / she does not need it to take an action or make a decision).

In terms of linguistic form, conciseness can be achieved in at least two ways. First, you should use as few words as you can without sacrificing meaning. For example, if an idea can be expressed clearly in ten words, you should not use 11.

#### **ACTIVITY 11**

1 Consider the following sentence, which has 18 words. Can you make it more concise? Write your revised sentence below.

This group is carrying out an investigation into the cause of the accident to find out the reason.

Your version:

2 How many words does your sentence contain? Did your revision change the meaning of the original sentence? If it did, revise it again to make sure the original meaning is retained.

The second effective way to achieve conciseness is to avoid unnecessary repetitions. Some examples of unnecessary repetitions include using multiple adjectives with similar meanings to modify a noun, or stating the same idea more than once.

Conciseness can also be achieved through a shorter paragraph, which enhances comprehension at the same time.

#### **ACTIVITY 12**

**ACTIVITY 13** 

В

Read the short paragraph below. Identify and underline the parts that repeat themselves. Then try to make the paragraph more concise by cutting out those repetitive phrases or by combining sentences.

The main purpose of this report is to explore the variety of media that can be used to disseminate instructions and how the type of media used should be considered as part of the instruction writing process. In some situations, the media type greatly impacts the effectiveness of the instructions. In this report, instructions developed in three different types of media are compared to determine if media use impacts the effectiveness of the instructions.

rour version.			

#### 3 Make your workplace writing precise

A workplace document must convey information accurately and precisely. No ambiguity or vagueness should exist. In other words, workplace writing that allows more than one interpretation is unacceptable.

The sentence below is ambiguous because it can have two different interpretations.
Kathleen returned all the books to Mary before she left the country.
(1) Write down the two possible meanings of the above sentence.
^

(2) Now modify the original sentence so that the ambiguity is eliminated.

Your version:

#### 4 Make your workplace writing linguistically correct

Workplace writing is mostly formal writing. Therefore, the writer is expected to use standard, correct English, free from grammatical errors, typographical errors, spelling mistakes, or extra spaces between words, sentences, or paragraphs. Such errors often confuse the reader and call into question the credentials of the writer as well as authoritativeness of the content of the document, so make sure you revise and edit your work carefully to eliminate such slips. Workplace writing should also stay away from slangs and colloquialisms.

#### 5 Make your workplace writing visually clarified

Now more than ever, workplace documents use graphics to enhance document clarity and reader comprehension. For example, a bar chart or a table can present a large amount of numerical data in an orderly, concise, and easy-to-understand way, and a drawing or a picture will help illustrate and clarify a complicated procedure or concept.

Graphics found in workplace documents include graphs (such as bar graphs, line graphs, pie charts, flow charts, and Gantt charts), tables, illustrations (such as diagrams and sketches), photographs, symbols, icons, videos, and so on.

For a detailed discussion on the use of graphics, please refer to Unit 4 of this book.

A	ACTIVITY 14					
1	Read the instructions below on how to use a fire extinguisher.					
	Step 1 Pull the pin. Step 2 Aim at the base of fire. Step 3 Squeeze the lever. Step 4 Sweep side to side.					
	Roughly how much did you understand the four-step instructions above?					
2	Now read the instructions below with the help of pictures.					
	PULL THE PIN  AIM AT THE BASE OF FIRE					
	SQUEEZE THE LEVER  SWEEP SIDE TO SIDE					
	[Source: neyro2008 © 123rf.com]					
	Roughly how much did you understand the four-step instructions above this time?					
	□ 10% □ 40% □ 70% □ 100%					
3	Please describe how the pictures helped you better understand the written text in 2-5 sentences.					

#### 6 Make your workplace writing easily accessible

Unlike readers of other types of writing such as fictions, biographies, or autobiographies, which are usually read from the beginning to the end, readers of workplace documents can be very selective and will only look for and read the information they need while skipping the rest. Therefore, to make sure your workplace document is easily accessible so that readers can find information they need quickly, your document should be divided up into smaller sections with marked access points, using devices such as headings, subheadings, a table of contents, an index, and / or an abstract or a summary. When used consistently, such devices will make your document easily searchable, accessible, and user-friendly.

Figure 1.2 is part of an abridged table of contents of a dryer owner manual. It has three first-level headings, namely "Installing your electric dryer," "Operating your electric dryer," and "Maintaining and cleaning your electric dryer." While the first two first-level headings also have their own second-level subheadings, one of them, i.e., "Selecting settings," also has three third-level subheadings. By labeling these headings and subheadings consistently, the writer is able to break up the owner manual into smaller parts, giving the reader an opportunity to quickly understand the manual structure and go directly to the section he / she is interested in.

- I Installing your electric dryer
  - 1 Installing the exhaust system
  - 2 Connecting electricity
  - 3 Connecting the inlet water hose
- Il Operating your electric dryer
  - 1 Loading the dryer
  - 2 Selecting settings

    - 2.1 Selecting dry level
    - 2.2 Selecting temperature
    - 2.3 Selecting time
  - 3 Start the dryer
- III Maintaining and cleaning your electric dryer

. .

Figure 1.2 Example of headings and subheadings

#### **ACTIVITY 15**

Look for an academic journal article in your field of study and browse through it. What devices does the author use to help readers find information easily? Make a list of all the devices used and share the list with your classmates in class.

## 7 Make your workplace writing linguistically and technically appropriate

If a workplace document is written in language that is beyond the linguistic or technical proficiency level of the target reader, comprehension will not take place. As a result, you will not be able to achieve the purpose of your workplace document since the target reader does not understand what you are saying.

For example, below is the results section of a laboratory report submitted by a biology graduate student to her professor about her field study on beavers' food selection behaviors.

"Overall, beavers showed a preference for certain species of trees, and their preference was based on distance from the central place. Measurements taken at the study site show that beavers avoided oaks and musclewoods ... and show a significant food preference ... No avoidance or particular preference was observed for the other tree species. The mean distance of 8.42 m away from the water for not-chewed trees was significantly greater than the mean distance of 6.13 m for chewed trees ... The tree species that were avoided were not significantly farther from the water than selected trees. For the selected tree species, no significant difference in circumference was found between trees that were not chewed ... and chewed ..."

[Source: https://projects.ncsu.edu/labwrite/res/labreport/res-sample-labrep1.html Reprinted with permission of North Carolina State University.]

You can see that the language used in the above summary is quite specialized (as it requires certain statistical background to understand it), yet this level of technicality is appropriate since the target reader, the professor, is an expert in the field.

However, if the target reader of the same paragraph is an elementary or middle school student, the linguistic and technical levels become inappropriately difficult.

## 8 Make your workplace writing well-suited for the channel of delivery

In this rapidly changing world, the traditional postal delivery services are increasingly supplemented or even replaced by electronic means such as email, email attachments, Dropbox, Google Docs, Web links, CDs, videos, podcasts and many more. Knowing how a workplace document will be delivered to its target audience has become all the more important as the way of delivery can determine, at least partially, how you create your workplace document (in print as hard copies or electronically as Word, PowerPoint, plain text, PDF, or video files that can be delivered as attachments), what font style to use or not to use (for example, you may avoid italics or bullets if you are going to send your document electronically because such typographical features do not keep well when transmitted electronically), and the quality, size, or even color of the paper, folder, or envelop if documents are sent by postal mail.



#### In this unit, you have learned that workplace writing:

- always has a purpose;
- contains specific / specialized information;
- has a readily recognizable format;
- has a specific target reader;
- is often completed through a process;
- is sometimes carried out in teams;
- is often cross-cultural.

#### The following types of documents are often found in the workplace:

- emails, letters, and memorandums;
- résumés and job application letters;
- instructions and procedures;
- proposals;
- informal reports (such as lab reports, incident reports, progress reports, and meeting minutes);
- abstracts and executive summaries;
- formal reports, and many more.

#### You have also learned that workplace documents are effective if they are:

- reader-centered:
- concise:
- precise;
- linguistically correct;
- visually clarified with appropriately used graphics;
- easily accessible;
- at an appropriate linguistic and technical level;
- ▶ tailored for the intended channel of delivery.

# EXERCISE AND PROJECT

#### **EXERCISE**

The business letter on the next page has achieved its purpose of selling an extended warranty to a car owner by using a number of ways to make this letter effective. Identify these ways, cite an example from the letter for each, and write it in the blanks below.

- Reader-centered:
- Concise:
- Precise:
- Linguistically correct:
- Visually clarified:
- Easily accessible:
- Linguistically and technically appropriate for the target audience:
- Well-suited for the channel of delivery:

#### **PROJECT**

#### Step 1

Look around your house to find five documents that you think fall into the category of workplace documents.

Bring them to class and share them with the person sitting next to you. Do you both agree that all your documents are workplace documents? Why or why not?

#### Step 2

Work in small groups of four or five.

Choose one document from the five you brought to class and evaluate how successful it is as a workplace document, using the characteristics of workplace documents discussed in this unit. Explain your evaluation to your teammates. Then choose the best evaluation from the group and present it to the class orally.

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