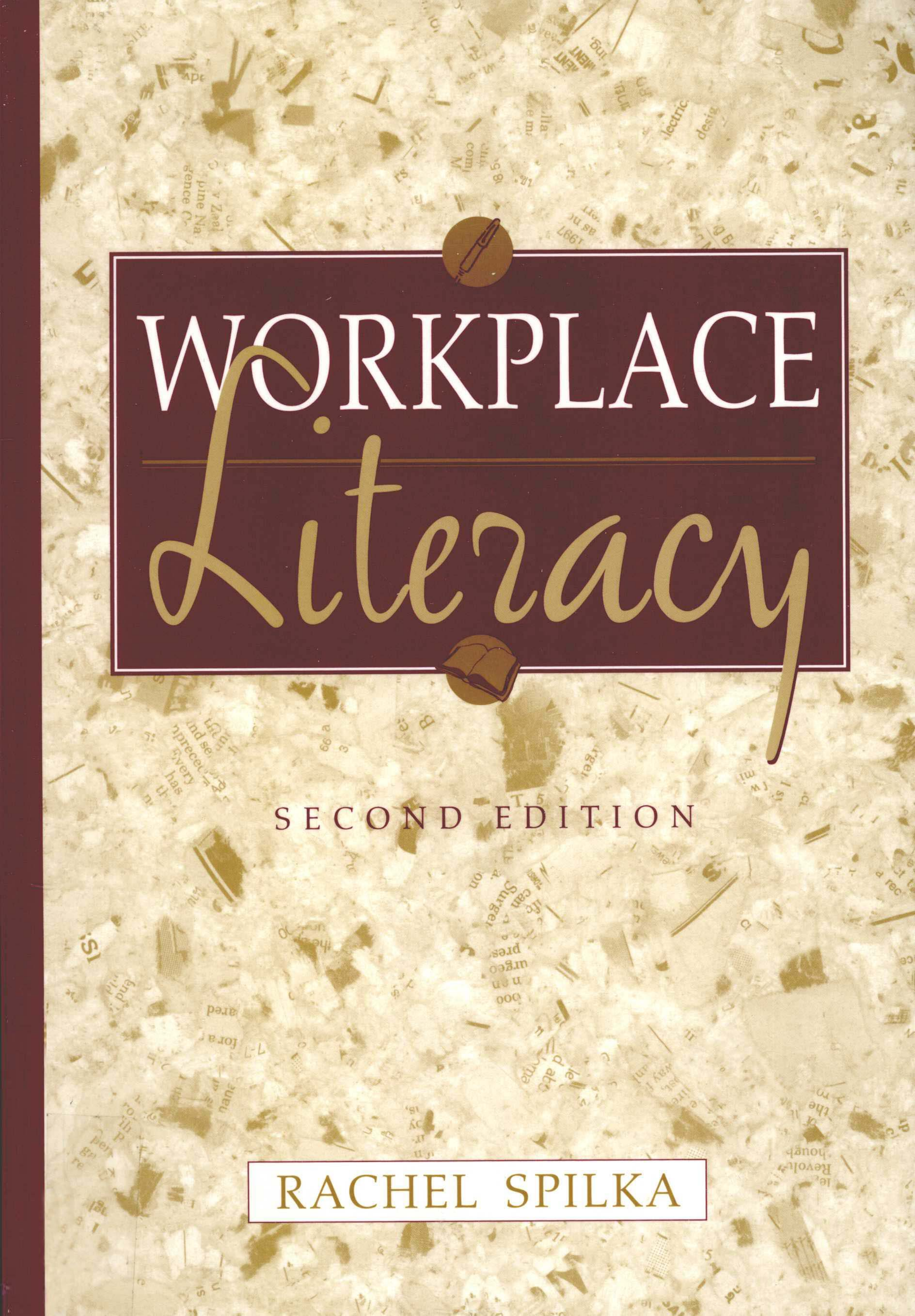

WORKPLACE Literacy

SECOND EDITION

RACHEL SPILKA

WORKPLACE LITERACY

Second Edition

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INTRODUCTION

Times have changed. It used to be that students would start thinking about their postgraduate career in their senior year, often during their final semester of college. Today, most students start thinking about a major, and about postgraduate careers, in their freshman or sophomore year. About twenty-five years ago, most students landed their first professional job after graduation. Today, most students work in internships or jobs related to their field long before graduation.

Another change is the approach modern students take to developing job competency skills. It used to be that during college, students would focus just on learning, without giving that much thought to how they would apply what they learn to "real life" job situations. Today, students are eager to know how their education will apply to their postgraduate careers. When they study a topic, they want to know how it might be relevant to their career choice. This way of thinking also applies to writing courses: when students study writing, they want to know how doing so will help them compete favorably for postgraduate jobs, and then perform well in those jobs.

The main purpose of this book is to provide you with practical, effective strategies for communicating effectively in workplace settings. You will find it useful if you are seeking a professional career that will require strong writing skills. Throughout this book, you'll find practical, "how to" strategies for analyzing, researching, planning, and writing workplace documents. As a result of reading parts or all of this book, you will become familiar with writing strategies that have proven effective in countless work sites. Once you apply these strategies to "real life" workplace situations, both now and after graduation, you will become a more valuable-and valued-contributor to your current or future work sites.

This book takes the approach that workplace professionals primarily write and communicate to resolve workplace problems. **Chapter 1** defines and describes workplace literacy as an activity not ever done just "for the heck of it," but instead, always done for a social purpose, often to identify, analyze, and then help resolve workplace problems. In **Chapter 2**, you will learn a skill that many professionals never master: how to state and analyze a workplace problem. Once you take this step, you'll be ready to identify and analyze a document's audience, purposes, and constraints, a set of thought processes that **Chapter 3** describes in some detail. Then you'll be ready to learn more about the problem. In **Chapter 4**, you'll discover that in workplace settings, most knowledge is located not in books, journals, or library archives, and not even on the internet, but rather in people's minds. That chapter provides practical advice and strategies for interviewing and surveying people with knowledge, experience, or power in order to uncover current, important information that a document will need to cover on a topic or problem.

Because effective workplace writing involves early participation in idea development, as well as strong time management and organization skill, **Chapter 5** focuses on useful strategies for managing writing projects in workplace settings. There, you can find practical advice about how to design planning charts and ensure smooth collaboration throughout team projects, among other topics.

Once you have stated, analyzed, and researched a workplace problem and have planned your writing project, you'll be ready to write. **Chapters 6, 7, and 8** focus on specific strategies for writing business correspondence **(Chapter 6)**, designing all types of workplace documents **(Chapter 7)**, and evaluating document quality **(Chapter 8).**

Workplace writing, however, does not exist in a vacuum. Most workplace problems are resolved by an ongoing chain of written and oral forms of communication. Rarely do writers produce just a single written document; more typically, they produce a series of documents interspersed by meetings, informal discussions, and formal presentations that, in combination, help inform, instruct, persuade, or fulfill other writing goals. **Chapter 9** therefore serves as a valuable supplement to the other chapters of this book by providing practical advice about planning and giving presentations that can supplement documents in fulfilling important project goals.

Some of you might read **Chapters 1 through 9** and become intrigued by the idea of pursuing a career in workplace writing. You should know that misconceptions proliferate about careers in workplace writing – for example, many believe that the only lucrative and abundant jobs in workplace writing require a high level of technical know-how and involve mostly manual writing. **Chapter 10** demonstrates that a wide variety of workplace writing jobs exist, and explores skills you would need to develop to prepare yourself well for a workplace writing career.

More than anything, this book aims to help you recognize how workplace literacy can lead to valuable social change in the workplace and to introduce you to practical ways of participating actively in that kind of change. Not that many workplace professionals are talented at writing and communicating. Perhaps this book will help you become part of a new generation of professionals that will be adept at resolving workplace problems by applying the practical advice and strategies described in these chapters. If this happens, your current and future employers will undoubtedly appreciate having such a valuable new colleague come on board to raise the quality of literacy at your work sites.

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CHAPTER 1

What is Workplace Literacy?

Workplace literacy typically serves a central social purpose, to help professionals in organizations accomplish the following:

- Solve a problem
- Answer a question
- Make a decision
- Revise or create policy
- Perform a task
- Expand or modify their thinking

Workplace writing usually isn't done for personal reasons, "just for the heck of it," or for sheer pleasure. Almost always, professionals in organizations write in response to a social need or problem. Successful workplace communication can be critical to an organization's ability to fulfill its goals, overcome its constraints, and, in general, function smoothly and make progress toward its mission.

What Are Examples of Workplace Literacy?

Workplace literacy involves the ability to create a wide spectrum of standard written documents. Here is just a sampling:

- Email messages, memos, and business letters
- Annual, research, recommendation, and feasibility reports
- Proposals
- Manuals, tutorials, and online help
- Specs, standards, summaries, descriptions, and definitions
- Policy statements
- Sales letters, flyers, brochures, newsletters, and other promotional material

Non-standard types of workplace literacy have become increasingly common at organizations. Take, for example, **online help** that provides guidance and instructions to help users complete a computer-related task. Other examples are the **minutes of meetings** or **slides** for a presentation—hybrid forms that record in documents what was spoken or will be spoken in face-to-face meetings. Consider, as well, a **computer interactive program** designed to help users make a decision (for example, about which health plan to choose at an organization). Such a program might supplement text with graphics and sound.

Exercise

List at least five documents produced in organizations that might have contributed recently to the quality of your family's life.

What Skills Are Necessary for Workplace Literacy?

Usually, when people define “literacy,” they consider just the **ability to read and write**. In most workplace settings, though, “literacy” takes on a broader meaning. To become “literate” in most workplace settings, professionals need to supplement basic reading and writing ability with some or all of the following skills:

- **Interacting** with others in the workplace setting (for example, with conversations, structured interviews, and surveys) to gain current, accurate information about the document and its context.
- **Planning** how to produce a document that will fulfill its purposes, please its readers, and function well within a workplace context.
- **Managing** the project to ensure continuous productivity and effective use of resources from start to finish; ensuring that the document remains under budget and is completed on time; juggling this project with others.
- **Collaborating** with others to research, plan, produce, evaluate, and revise drafts of the document.
- **Designing** the document to ensure its usability and readability.
- **Evaluating** document drafts with measures of internal workplace acceptance (such as peer and subject-matter expert reviews), and ultimate user or reader acceptance (such as usability tests and focus groups), and then revising on the basis of that feedback.
- **Using computer technology** to produce a professional-looking document.

- **Giving presentations, training sessions, or workshops** at informal or formal meetings to deliver the same messages (that are in the document), and to help accomplish similar goals, such as informing, instructing, and persuading.

Developing these skills takes time. Research shows that some recent graduates from academic programs require up to a full year or more in a new job before they're able to develop the knowledge and skills necessary to communicate effectively there. In many work sites, new employees who take the time to learn about their organization's culture (such as its expectations, requirements, conventions, politics, and controversies) are often the ones who earn the trust and respect of their colleagues most quickly. Once they're able to demonstrate their ability to research, plan, and produce documents that are appropriate for their organization's context, they demonstrate, as well, their ability to adapt and contribute in valuable ways to their corporate culture.

Exercise

List the workplace literacy skills you have developed, already, at college, jobs, volunteer work, and life experiences. Now list workplace literacy skills you would like to develop before graduation to prepare for a postgraduate career.

Public literacy designates language that appears in the public sphere–beyond organizational boundaries–and deals with issues of concern to the general public. Examples are:

- Bumper stickers
- Newspapers
- Tax forms
- Petitions
- Web pages
- Community radio broadcasts
- Advertisements
- Political debates

Unlike public literacy, workplace literacy typically is rooted in specific work contexts. Consider, for example, how an annual report describes the past year's activity in a particular company, how a manual instructs users about how to use software that company has just produced, or how a proposal aims to fund a new corporate venture.

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In addition, workplace literacy typically addresses a specific problem or need at an organization. Here are just a few examples:

- Technical writers at a computer circuit board company write manuals to instruct users about how to use the circuit boards.
- Project managers in a research and development institute write reports that present the findings of government-sponsored public policy studies.
- Engineers at a Fortune 500 company create slides for a presentation that will summarize their unit's accomplishments over the past fiscal year for their board of directors.

Exercise

List five similarities and five dissimilarities between researching and writing an article for a town newspaper (public literacy) and researching and writing an article for a corporate newsletter (workplace literacy). What is similar or different about what can influence the writer and what the writer must do?

How Does Workplace Literacy Differ from School-Based Writing?

The transition from school-based and workplace literacy can be challenging. The following, brief comparison highlights some of the significant differences between what students typically do as writers before and after graduation, and suggests why the transition from one type of literacy to the other can require some major shifts in thinking and writing strategies:

1. Differences in Purposes

Often, students write essays, reports, and other course assignments for personal gain—to demonstrate knowledge and skill, and of course to earn a high grade.

Workplace professionals also write for personal gain—to impress others with their communication skill in order to become valued and respected (and perhaps promoted) in an organization and to further causes that they personally endorse. But just as often, they write for the social good—for example, to solve problems for the organization, fulfill workplace goals, and promote overall productivity by helping others do their job better. Workplace writing therefore tends to be more "other oriented" than school-based writing.

2. Differences in Readers

Typically, students write for one person (the teacher or professor) who often knows more than the student about the topic and cares about the topic.

In contrast, workplace professionals typically write for a diverse, multiple readers with different levels of knowledge, caring, and investment in the topic. Writing for readers with little to no knowledge, caring, or investment can be quite a challenge. In such situations, writers often need to draw upon a wide array of strategies that they might not have needed to use in school-based essays and reports.

3. Differences in Style

Many teachers ask students to use "an impressive vocabulary," produce lengthy essays or reports, and use a formal style and tone. Often, teachers indicate to students that "the more you write, the better."

Workplace literacy typically requires an opposite approach: Usually, "less is more." Because readers rarely have much time to look at documents carefully, workplace writers often need to design documents carefully to promote or facilitate quick scanning or skimming. The style of workplace writing is often characterized by:

- Precision and accuracy
- Clarity
- Conciseness
- A focus on central issues

In workplace writing, the degree of formality or informality depends on the context, situation, and type of document. To create appropriate, effective documents in workplace settings, writers often need to analyze their contexts and situations extensively before deciding on the appropriate style for their documents.

4. Differences in Format and Design

School assignments (such as essays and reports) are typically text-based and may not require graphics.

Workplace documents, in contrast, often integrate text with graphics and visuals, and often rely heavily on design and graphics to convey messages.

5. Differences in Process and Delivery

Students usually write in isolation, and interact little or not at all during planning, writing, and revision. They tend to rely more on written sources of knowledge (such as those found in books and journals or over the Internet) than on human sources. They also typically deliver their messages via writing and not with oral presentations.

Workplace writers rarely produce a document in complete isolation. They often rely quite heavily on human sources of knowledge, and interact often during the stages of research, planning, writing, and revision. Often, workplace writers need to deliver their messages through presentations in addition to producing a document, and those presentations can be more powerful and effective than the document in accomplishing the overall purpose (for example, informing, instructing, or persuading). In workplace contexts, writing can be important, yet less critical than oral communication in achieving workplace goals.

Although adjusting to workplace writing certainly takes some time and effort, some students discover that they have a greater affinity (and more talent) for this type of writing than for school assignments. Many also discover that they enjoy this type of communication because of its quick (often immediate) effects on workplace practice. It can be rewarding to contribute to the social mission of an organization – to use writing to help employees who work there, as well as clients and customers who use the company's products and services.

Exercise

List five ways that you will need to adjust your own writing style and behavior when you begin a workplace job. Or, if you are working now in a professional setting, list five ways that you needed to adjust so that you could write effectively in that context.

CHAPTER 2

Stating and Analyzing the Problem

Workplace literacy is almost always a response to a problem or need within professional settings. You can think of a problem or need as a conflict with the potential to create tension, uneasiness, or frustration. Three of the most typical responses to conflict are inaction, violence, and communication:

- **Inaction** (doing nothing), the most common response, does not always lead to a cessation or resolution of the problem.

- **Violence**, the most unfortunate response, should never occur in professional settings for obvious reasons.

- **Communication** is the most desirable response because—if used effectively—it has the greatest potential to effectively resolve the underlying problem or need in a way that satisfies all parties involved.

What Are the Steps in Stating a Problem?

Before you can decide how to use communication to resolve a problem, you need to understand the underlying problem reasonably well. Writing a clear, succinct, but complete problem statement is an important first step toward accomplishing that goal because doing so helps you define, and therefore understand more fully, the underlying problem.

Writing an effective, complete problem statement is also important because in many reports and other documents, it can become a central feature and might appear often in multiple sections. For example, in proposals, a problem statement might appear in the abstract, executive

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