# WRITING IN ORGANIZATIONS

PURPOSES, STRATEGIES, & PROCESSES



PEGGY MAKI / CAROL SCHILLING

## WRITING IN ORGANIZATIONS

## PURPOSES, STRATEGIES, AND PROCESSES

PEGGY MAKI
Beaver College

CAROL SCHILLING
University of Pennsylvania

#### McGraw-Hill Book Company

New York St. Louis San Francisco Auckland Bogotá Hamburg Johannesburg London Madrid Mexico Milan Montreal New Delhi Panama Paris São Paulo Singapore Sydney Tokyo Toronto

#### Library of Congress Cataloging-in-Publication Data

Maki, Peggy.

Writing in organizations.

Bibliography: p.

1. English language—Rhetoric. 2. English language—Business English. 3. Communication in organizations.

I. Schilling, Carol. II. Title.

PE1479.B87M34 1987 808'.066651 86-10277

ISBN 0-07-030361-4

## WRITING IN ORGANIZATIONS: PURPOSES, STRATEGIES, AND PROCESSES

Copyright © 1987 by McGraw-Hill, Inc. All rights reserved. Printed in the United States of America. Except as permitted under the United States Copyright Act of 1976, no part of this publication may be reproduced or distributed in any form or by any means, or stored in a data base or retrieval systems, without the prior written permission of the publisher.

1 2 3 4 5 6 7 8 9 0 DOC DOC 8 9 8 7 6

#### ISBN 0-07-030361-4

This book was set in Times Roman by Automated Composition Service, Inc. The editors were Emily G. Barrosse and Barry Benjamin; the designer was Scott Chelius; the production supervisor was Joe Campanella. The drawings were done by Volt Information Sciences, Inc. R. R. Donnelley & Sons Company was printer and binder.

### About the Author

PEGGY MAKI is Assistant Professor and Chair of the English, Theatre Arts, and Communications Department at Beaver College where she teaches writing courses in the Writing Across the Curriculum program, undergraduate and graduate courses in professional writing, and in theories of written communication, the teaching of writing, and linguistics. She has also directed the College's Writing Center. Since 1981 she has been on the faculty of NEH summer institutes in the teaching of writing and has consulted with colleges, universities, and elementary and secondary schools as they developed writing programs. She has served on the faculty of several colleges and universities and developed workshops on professional writing for government, business, industry, and health organizations. In 1983 she was Chair of the Eastern Regional ABCA Conference. She has delivered papers at CCCC, national and international ABCA Conferences, the Penn State Conference on Rhetoric and Composition, NEMLA, the International Conference on Computers in the Humanities, the Mid-American Linguistics Conference, and the Penn Linguistics Colloquium. In 1984 she received the Lindback Award for Distinguished Teaching.

CAROL SCHILLING served as Assistant Professor of English at Beaver College while teaching the writing course from which this text grew. She worked with the Beaver College faculty to create its Writing Across the Curriculum program and taught graduate and undergraduate courses in cross-disciplinary and professional writing, literature, and theories of written communication. She is currently teaching courses in writing, the humanities, and literature at the University of Pennsylvania in the College of Arts and Sciences and the School of Engineering and Applied Sciences. At Penn, she has been designated a Senior Fellow and a Research Fellow in the Writing Across the University Program, for which she has researched and designed writing courses and worked with faculty, TAs, and students in the Wharton, Engineering, and Arts and Sciences schools. She has studied literature and rhetoric and has a diverse background in teaching, which has included appointments in several colleges and universities. She has served as a consultant to NEH summer institutes in writing, and she has presented papers at MLA, CCCC, the International ABCA Conference, and the Penn State Conference on Rhetoric and Composition.

"It would be easy to describe the courses of lectures that have been read to classes, and methods of conducting the critical exercises in composition. But how insufficient do all these appear to account for what we see [students] do when [they pass] from the rudiments at school to responsible writing in the real work of life."

Edward Tyrell Channing

Lectures Read to the Seniors
in Harvard College (1856)

#### PREFACE

Background: Principles and

Practices

This book has grown out of our experiences teaching an advanced writing course at Beaver College. Our goal for this course has been to prepare juniors and seniors to make the transition from writing as students to writing as professionals. Our aim is to challenge students to transfer their growing expertise in their chosen disciplines to the kinds of problems and issues they will encounter during their professional lives. We emphasize that writing enables students to translate their understanding of the world into what we hope will be useful and responsible actions in the world, where words and actions are linked.

Like our course, this book focuses on principles of rhetoric, problem solving, and critical thinking that apply to composing various organizational documents. As we developed the course, we were immensely fortunate to be able to participate in cross-disciplinary faculty seminars in teaching writing which the National Endowment for the Humanities sponsored at Beaver College. These seminars introduced us to a remarkable array of scholars and writers from several disciplines who taught us recent theories of language, discourse, composing, and critical thinking, as well as ancient and modern theories of rhetoric.

As we applied these theories, which were rapidly being absorbed by freshman composition courses and texts, to our professional writing course, we conducted our own first-hand investigation of writing that occurs in organizational settings. As we taught and shaped our courses over the years, we discovered we had accumulated the makings of a book that could enable others to put current research into practice. The first five chapters of this book introduce the principles that inform our teaching of writing; the remaining ten chapters apply those principles to particular kinds of writing.

xviii PREFACE

#### Collaborative Writing

As we surveyed organizational writing, we quickly discovered that documents composed in organizations are frequently the products of two or more writers—often from different disciplines—working together. Such collaborative efforts are more successful when participants can listen to and accommodate different points of view. As a result, we guide students through various strategies for working and writing together. For example, throughout this book, we teach students how to review each other's work in progress. We also introduce them to some principles of working together to produce a single document with a multiple authorship. Although Chapter 15—"Writing Collaboratively"—is the final chapter, the principles in it can be applied to any genre of writing at any point in the course.

#### Classifying Organizational Writing

Our readers may wonder why we have included genres of professional writing under the rubric of organizational writing. One reason is our discovery that no matter what careers our students choose, the common shaper of their writing will be the organizational setting in which they work. Although it is difficult to replicate the context of organizational writing in classrooms, we can recreate some of its essential features. For example, we have found two useful ways to simulate worksponsored writing. First, we have directed students to work on problems and issues within their own fields or on their own campuses. Second, we have emphasized the rhetorical principles of writing to various readers, for various purposes, and within various situational contexts.

We have further classified organizational writing according to both its rhetorical purposes and its conventional genres. The latter include letters, memos, instructions, directives, reports, and proposals. We found that the conventional genres of workplace writing frequently overlap. For example, a "report" may follow the format for long, formal reports or it may be more like a memo.

We also discovered that documents classified under different genres, or even covered in different courses, can share some important rhetorical principles. For example, directives are considered a form of "business" writing carried out by executives, while instructions are usually considered a form of "technical" writing carried out by engineers. Yet both kinds of writing follow the rhetorical principles of writing that instructs. In addition, engineers work within organizational contexts and often carry out executive functions—such as writing directives.

For these reasons, we have initially classified the documents considered in Chapters 6 through 14 according to four commonly accepted genres—correspondence, directions, reports, and proposals—and we have then classified the documents within each genre according to their primary and secondary purposes—to express, inform, explore, document, instruct, and persuade).

Preface xix

#### Processes of Writing

In addition to emphasizing the organizational context that both generates and shapes career writing, we pay careful attention to the *processes of composing* documents intended to fulfill a particular purpose. We frequently show a composing process in slow motion and pause to consider both large and small steps, often recursive ones, along the way. We also stop to suggest an array of strategies for managing the complexities of that process. As a result, we often make these "steps" look more discrete than they often are in practice.

Our readers may wonder if the models of composing we present, workable though they are for classroom writing, are realistic for career writing. After all, deadlines, a mainstay of life in organizations, shorten and simplify any writer's process. Our own observations support the research that concludes that writers in an organization frequently write only one draft. Yet many documents go through numerous drafts, including several reviews and extensive revisions, before being sent.

Furthermore, we have learned that when writers tackle a new genre of writing or write about a new problem or issue, they compose more slowly than when they write in familiar modes about familiar subjects. Since we introduce students to new genres and new problems to solve, we find that slowing down the process is pedagogically wise. We tell our students, however, that as they become more experienced, they will collapse the detailed process that we outline.

An overview of processes of composing and problem solving is introduced in the first five chapters of this book. Chapters 7, 8, 10, 11, 13, and 14 show individual writers shaping their own composing processes in accordance with their experiences, talents, and intuitions as they write within the constraints of deadlines, policies, and the vagaries of life in organizations.

#### Acknowledgments

Transferring our actual classroom interactions onto paper and making our principles and practices accessible to others has been a lengthy and challenging process. Along the way, we discovered that we couldn't have managed without extensive collaboration—first of all, with each other. We have also benefited from the compelling responses of our students and the generosity of our colleagues, reviewers, and publisher.

We have borrowed from the thinking and research of many teachers and scholars. Their work has reached us through the media of printed pages, university and faculty seminars (including ones sponsored by the National Endowment for the Humanities in 1979, 1980, and 1981 and by the Fund for the Improvement of Post-Secondary Education in 1982 and 1983), lectures, conference presentations, and conversations. Many of those we name already know how indebted we are to them; others may be surprised to find their names listed here. Those whose work

**XX** PREFACE

has been particularly helpful include Kenneth Bruffee, Edward P. J. Corbett, Peter Elbow, Linda Flower, M. A. K. Halliday and Rugaiya Hasan, Maxine Hairston, John R. Hayes, E. D. Hirsch, James Kinneavy, Richard Lanham, Walter Ong, Joseph Williams, and Richard Young. Our colleagues at Beaver College have been a sustained source of ideas and expertise. We thank Elaine Maimon for encouraging us in our triple endeavors of teaching, researching, and writing. We have benefited from her leadership in the teaching of writing, especially her exploration of relationships between writing and thinking. We would also like to thank our resident philosopher, Barry O'Connor, social scientists Elizabeth Clark. Edith Gross, Norman Johnston, and Barbara Nodine for sharing their expertise when we called on them. Suzanne Kinard of the Atwood Library also contributed her informed assistance. We are especially grateful to Maryanne Bowers of the English Department for reading a draft of our manuscript thoughtfully and critically and for testing it in her classes.

In addition, our publisher provided us with several rounds of reviews from the time we began generating ideas until we had a finished manuscript. We continue to appreciate the efforts and suggestions of all our reviewers: Vivian Davis, Joseph Dunne, Larry Fiber, Robert Gieselman, Earl Harbert, Dennis Kawaharada, Gloria Lewis, Robin Bell Markels, Elaine Palm, Thomas Reigstad, Philip Rubins, Kathryn Seidel, Jack Selzer, Annette Shelby, and Michele Souda. Their range of responses enlightened us as we worked.

Several organizations opened their doors to us, allowing us to observe, question, and sometimes work with their managers and staff. We appreciate their cooperation and trust. In particular, we thank AMP Incorporated, especially Yvonne Walko; Leeds & Northrup Systems, especially Robert Manne, Joe Peca, Kenneth Creech, and Summer Peirce; Nashua Corporation; McNeil Consumer Products Co., especially Johanna Jones; Pacer Systems, Inc., especially Dee McCornac; the Pennsylvania Department of Consumer Affairs, especially Mary Saylor; and RCA-Americom, especially Charles Church and Rodney Stevens.

Over the years our students in Writing for Careers (EN/BA 215) have illuminated our work more than they may realize. A number of them, currently successful writers in organizations, have kept in touch and shared their work with us. We offer a special thanks to Gayle Assetto, Wanda Burke, Michele DiCarlo, Suzanne Eckert, Marie Lawrence, Andrew Leschak, Gena Recigno, Lynn Rogers, and Mimi Seyfert for allowing us to include their classroom and work-sponsored writing in this text.

Carol Lynn Daly and Gale Trusky have our thanks for relieving us of some of the typing chores.

The editorial staff at McGraw-Hill remained committed to what turned out to be a complex project. Phillip Butcher, editor-in-chief for social science and humanities texts in the College Division, got our project under way. Emily Barrosse, our sponsoring editor, and Barry Benjamin, the area editing supervisor, made thoughtful suggestions and practiced extraordinary patience as we moved from drafts to final copy. Mel Haber, art director, initiated novices into the *art* of

Preface **xxi** 

textbook production. We are grateful to the entire McGraw-Hill staff for their sensitivity and professionalism.

Finally, we thank our extended and combined families for their remarkable good humor and generous spirits. Above all, Elizabeth, Carl, Ron, Andrew, David, and Lee provided delightful distractions, necessary support, occasional free labor and advice, and constant cooperation during the course of this project.

Peggy Maki Carol Schilling

## CONTENTS

#### Preface xvii

## PART ONE PURPOSES, STRATEGIES, AND PROCESSES

SECTION ONE

## STRATEGIES FOR WRITING IN ORGANIZATIONS

CHAPTER 1

## AN INTRODUCTION TO WRITING IN ORGANIZATIONS 3

THE COMMUNICATION PROCESS AT WORK 3

The Situational Context 4

Elements of the Communication Process 6

THE PURPOSES OF WRITING AT WORK 11
GENERAL CHARACTERISTICS OF WRITING FOR EACH

**PURPOSE 13** 

To Express 13

To Instruct 14

To Inform 14

To Explore 15

To Document 15

To Persuade 13

EXPLORING THREE CASES OF THE COMMUNICATION PROCESS
AT WORK 16

A CHECKLIST OF QUESTIONS WRITERS NEED TO ASK 19
PROJECTS AND EXERCISES 21

ix

#### CHAPTER 2

#### STRATEGIES FOR SOLVING PROBLEMS 23

USING WRITING TO SOLVE PROBLEMS IN ORGANIZATIONS 23
HEURISTICS FOR PROBLEM-SOLVING 24
USING PROBLEM-SOLVING STRATEGIES TO HELP YOU
COMPOSE 29
PROJECTS AND EXERCISES 36

#### CHAPTER 3

## STRATEGIES FOR GETTING STARTED AND DRAFTING 37

**GETTING STARTED 37** 

Identify Your Purpose, Your Readers, and the Problem You Are Solving 38

Brainstorm 38

Respond to Questions 39

Look at a Model 41

Imagine Your Reader Is with You 41

Talk to a Friend or Coworker 41

Make a Visual Representation 42

Ask Yourself What You Have to DO in Your Writing 42

define / 43 classify / 43 divide / 43 sequence steps or narrate events / 44 show cause and effect / 44 evaluate / 44 compare / 44 create an analogy / 45 describe / 47 explore a problem and offer solutions / 47 support a claim / 47

WRITING A TEST DRAFT 48
ASKING SOMEONE TO REVIEW YOUR DRAFT 49
PROJECTS AND EXERCISES 54

CHAPTER 4

## STRATEGIES FOR REVISING AND EDITING 56

FIRST REVIEW: READ FOR PURPOSE AND APPROPRIATENESS 57

Write a Purpose Sentence 57

Answer Questions About Your Document's Purpose and Appropriateness 58

SECOND REVIEW: READ FOR ARRANGEMENT AND

**COHESION 58** 

Write a Descriptive Outline 59

Sketch a Branching Outline 60

Write a Conventional Outline 61

Check Sentence Sequences 62

Check for Cohesive Language 63

advance organizers / 63 repetition of key words / 63 word substitutions / 63 conjunctions / 64 numbers / 64 transitional words / 64

Use Punctuation to Connect Ideas 65

#### THIRD REVIEW: READ FOR SENTENCES AND LANGUAGE 66

Unpack Overweight Sentences 66
Check Sentence Patterns 68
Check for an Authentic Voice 71
Use a Precise Vocabulary 73
Use Unbiased Language 74

FOURTH REVIEW: READ FOR ACCURACY 74

Check the Accuracy of Information 75
Check the Mechanics and Conventions of the Language 75
Proofread in a Novel Way 75
EXERCISES 78

#### SECTION TWO

#### STRATEGIES FOR DESIGNING A DOCUMENT

CHAPTER 5

#### DESIGNING A DOCUMENT 83

COPY ELEMENTS 84
GRAPHIC ELEMENTS 88
Photographs 91
Drawings 92
Charts 93

Tables 93 Graphs 100

A CHECKLIST FOR LAYOUT 105 PROJECTS AND EXERCISES 107

#### PART TWO

#### APPLICATIONS OF PURPOSES, STRATEGIES, AND PROCESSES TO PARTICULAR DOCUMENTS

SECTION THREE

## STRATEGIES FOR WRITING CORRESPONDENCE

CHAPTER 6

## PURPOSES FOR WRITING CORRESPONDENCE 113

EXPLORING THE PROBLEMS MEMOS SOLVE 115 EXPLORING THE PROBLEMS LETTERS SOLVE 115 PURPOSES OF CORRESPONDENCE 116

Writing to Express 117
Case: A Goodwill Memo 118
Case: A Rejection Letter 120

#### CONTENTS

Writing to Inform 121

Case: A Response Letter 122

Writing to Document 125

Case: A Documentary Memo 126

Writing to Explore 128

Case: A Progress Memo 129 Writing to Instruct 130

Case: An Instructional Memo 131

Writing to Persuade 132

Case: A Donation Letter 137

Case: An Application Letter and Resume 138

Case: A Collection Letter 140

PROJECTS AND EXERCISES 144

#### CHAPTER 7

#### WRITING CORRESPONDENCE 148

**GETTING STARTED 149** 

Using Models 149

Anticipating Readers' Questions 150

Dictating 151

**DRAFTING 153** 

Opening Paragraphs 155

COMPOSING A TEST DRAFT 158

Patterns of Arrangement in Paragraphs 159

Closing Paragraphs 161

**REVISING AND EDITING CORRESPONDENCE 162** 

DESIGNING A FINISHED DOCUMENT 163

Letter Format 163

Memo Format 169

PROOFREADING 170

A CHECKLIST FOR CORRESPONDENCE 171

PROJECTS AND EXERCISES 172

WRITER AND READER REVIEW SHEETS 174

#### CHAPTER 8

#### A WRITER AT WORK: A CASE STUDY OF **COMPOSING A LETTER 176**

IDENTIFYING THE PROBLEM WITHIN THE READER'S AND WRITER'S ORGANIZATIONAL CONTEXT 177 **GETTING STARTED 179** WRITING AND REVISING DRAFTS 182 PREPARING THE FINISHED LETTER 185

#### SECTION FOUR

#### STRATEGIES FOR WRITING INSTRUCTIONS, DIRECTIVES, AND OTHER PROCEDURAL DOCUMENTS

Contents **xiii** 

#### CHAPTER 9

#### PURPOSES FOR WRITING INSTRUCTIONS, DIRECTIVES, AND OTHER PROCEDURAL DOCUMENTS 191

EXPLORING THE PROBLEMS INSTRUCTIONS SOLVE 193
EXPLORING THE PROBLEMS DIRECTIVES SOLVE 193
EXPLORING THE PROBLEMS OTHER PROCEDURAL
DOCUMENTS SOLVE 194

PURPOSES OF INSTRUCTIONS, DIRECTIVES, AND OTHER PROCEDURAL DOCUMENTS 195

To Instruct 196

Case: A Memo Directive 197
Case: Policy and Procedures 198
Case: Product Instructions 200

To Inform 202

Case: Describing Procedures in a Sales Letter 203
Case: Describing Procedures in a Report 205
PROJECT AND EXERCISES 207

#### CHAPTER 10

## WRITING INSTRUCTIONS, DIRECTIVES, AND OTHER PROCEDURAL DOCUMENTS 210

GETTING STARTED 210 DRAFTING 213

COMPOSING A TEST DRAFT 216

REVISING AND EDITING INSTRUCTIONS AND DIRECTIVES 221
DESIGNING A FINISHED DOCUMENT 222
A CHECKLIST FOR INSTRUCTIONAL AND PROCEDURAL

DOCUMENTS 224

REVISING INSTRUCTIONS FOR A SPOKEN PRESENTATION: A CHECKLIST 225

PROJECTS AND EXERCISES 229
WRITER AND READER REVIEW SHEETS 232

#### CHAPTER 11

## A WRITER AT WORK: A CASE STUDY OF COMPOSING A SET OF INSTRUCTIONS 236

IDENTIFYING THE PROBLEM 236
GETTING STARTED 237
WRITING AND REVISING DRAFTS 240
REVISING AND EDITING THE DRAFT 242
DESIGNING THE FINAL DOCUMENT 244

#### SECTION FIVE

## STRATEGIES FOR WRITING REPORTS AND PROPOSALS

#### CHAPTER 12

## PURPOSES FOR WRITING REPORTS AND PROPOSALS 251

EXPLORING THE PROBLEMS REPORTS SOLVE 252 EXPLORING THE PROBLEMS PROPOSALS SOLVE 253 PURPOSES OF REPORTS AND PROPOSALS 255

To Inform 256

Case: A Periodic Memo 257

To Document 259

Case: Minutes of a Meeting 260

To Explore 261

Case: An Evaluation Report 262

To Persuade 264

Case: An Unsolicited Memo Proposal 267

Case: A Solicited Proposal 276

PROJECTS AND EXERCISES 280

#### CHAPTER 13

#### WRITING REPORTS AND PROPOSALS 281

STRATEGIES FOR GETTING STARTED 281 GATHERING INFORMATION 282

Primary Research 282

observations / 282 organizational documents / 282 questionnaires / 283 interviews / 290

Secondary Research 291

manual searches / 291 computer searches / 291

Recording Information 293

notetaking / 294 summarizing / 296 paraphrasing and quoting / 299

PLANNING, DRAFTING, AND REVISING 300

Developing an Overall Plan 300

Strategies for Organizing Specific Reports 301

consultant's reports / 301 monitoring reports / 302 feasibility reports / 302

Strategies for Organizing Specific Proposals 303

academic research proposals / 303 requests for improvements / 304 competitive proposals / 304

Revising and Editing Reports and Proposals 305

STRATEGIES FOR DESIGNING A FINAL DOCUMENT 306

Conventional Parts of Formal Reports and Proposals 306

A CHECKLIST FOR FORMAL REPORTS 313

A CHECKLIST FOR FORMAL PROPOSALS 314

PREPARING REPORTS OR PROPOSALS FOR A SPOKEN

PRESENTATION: A CHECKLIST 316

PROJECTS AND EXERCISES 320

WRITER AND READER REVIEW SHEETS 321

#### CHAPTER 14

## A WRITER AT WORK: A CASE STUDY OF COMPOSING A PROPOSAL 328

IDENTIFYING THE PROBLEM 328
GETTING STARTED 329
GATHERING INFORMATION 331
EVALUATING PROGRESS 337
WRITING AND REVISING DRAFTS 342
WRITING THE FINAL DRAFT 346

#### SECTION SIX

## STRATEGIES FOR WRITING COLLABORATIVELY

CHAPTER 15

#### WRITING COLLABORATIVELY 355

THE PRACTICE OF COLLABORATIVE WRITING IN ORGANIZATIONS 356

HOW TO SURVIVE THE COLLABORATIVE WRITING PROCESS 357

GENERATING IDEAS IN A GROUP 362
REVIEWING DRAFTS IN A GROUP 363

DESIGNING A FINAL DOCUMENT IN A GROUP 367
PROJECTS AND EXERCISES 369

#### **APPENDICES**

#### APPENDIX A:

SOME GRAB-BAG EXPRESSIONS 373

#### APPENDIX B:

GUIDELINES FOR AVOIDING BIASED LANGUAGE 374

APPENDIX C:

DATABASES AVAILABLE 383