TECHNICAL WRITING BASICS

A Guide to Style and Form

BRIAN R. HOLLOWAY

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To the Student . . . and Teacher

Special characteristics govern writing within, to, or for businesses, social-service agencies, health-care providers, and government entities. Often, textbooks surveying the challenges of such writing have stressed one of its several functions. For example, some authors teach entirely from a "technical" perspective, limiting discussion to the mechanics of production. Manuals depicting the proper way to construct tables, pie graphs, and charts are valuable resources; however, they supplement—rather than explain—the process of communication in the workplace. Similarly, a text focusing entirely upon the presentation of data may create an impression that one does not use persuasive techniques when informing an audience. Yet most students know that even the driest report may be made appetizing if its "package"—the format—is enhanced. Communication theorists, in fact, have a difficult time determining where "information" ceases and where "persuasion" begins; the two overlap, rather than comprise the ends of a continuum. A third editorial choice made by writers of texts focuses upon the persuasive aspects of communication in the workplace, as if the modes of presentation mattered most.

This text draws upon each of these partial perspectives in surveying holistic challenges within business and technical writing. Because this book is intended for students who have taken a freshman composition course but who have not necessarily worked in fields that demand the use of business and technical writing, its examples—real or fictionalized—are practical and basic. Writing letters of application and adjustment, constructing informational and persuasive reports, and encapsulating material so that it can be convincingly communicated are all activities shared by most college students; therefore, this book derives much of its illustration from such models. Throughout the text, then, three goals drive the content:

1. Students should study the requirements of informative writing.
2. Students should learn how the techniques of persuasion operate in writing in the workplace.
3. Students should practice casting informative and persuasive writing into an appropriate format.

Since what we practice depends on different aspects of business and technical writing but transcends it, I recommend that we call such communication *transactional writing*. In a transaction, the communicator provides information to the recipient of communication, but the recipient often must give up something as well; a prejudice (against the action proposed), free time (which could be spent eating lunch instead of reading a memo), or a method of doing something (which the information just received happens to contradict). Frequently, one must offer the flattest data in terms calculated to make reading a report seem worthwhile. Getting the other person to read one's material, presenting such material clearly and accurately, and adhering to standards of format acceptable in the field become the goals of transactional writing.

Educational Approach. The exercises and assignments in this text build in complexity, chapter by chapter, as well as inside such chapters; for example, in Chapter 7 the preliminary report (Figure 7.16) contains material that can be used in the proposal (Figure 7.17), and the final report (Figure 7.18) includes imports from the proposal itself. Such an incremental, cumulative approach assists students who use computers in their writing, as saved material that constitutes a previous assignment can be retrieved, modified, and transferred to the new document. Should the final report be collaborative, students can integrate their reports on disk as well. Such a collaborative method might encourage students in similar fields to work together to create unified projects. This approach reaffirms the future value of the work the student has just completed, and is pragmatic—real examples and models demonstrate what should be done.

Synopsis of the Table of Contents

This text is conceptually divided into three sections. The first unit, the "apprenticeship," covers the basics of transactional writing and encompasses Chapters 1 through 3. Chapters 4, 5, and 6 expand the scope of technical and business writing, building upon the foundation established earlier but introducing more complex assignments. Chapters 7 and 8 put the acquired knowledge to work in creating two polished, multisectioned documents: the formal report and the job portfolio. Chapter 9 contains a short list of references for further reading. An appendix on graphics follows.

Chapter 1—Introduction

The first section in Chapter 1, *What is "business" and "technical" writing?* surveys the features of transactional writing, exploring differences between such writing and the academic prose taught in composition classes. It discusses working together in small groups to achieve a writing goal, growing a larger

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document from a smaller one—or from fragments—and using computers to assist the process of creating a document.

Saying what you mean surveys the basics: grammar and usage. It identifies sentence types and problems, focusing on the impact of phrasing but discussing other mechanical issues as well. A section on diction encourages writing within the context of "world English," avoiding localisms and expressions that might confuse or antagonize readers.

Chapter 2—Organizing Information

Chapter 2 discusses how we impose patterns of logical order upon the infinite field of data around us, selecting from this field that which is necessary to support our message. This chapter reviews specific templates that structure logical presentations—many of them called "modes" in writing texts—such as *summary, process, analysis, comparison,* and *persuasion.*

Chapter 3—Letters, Memos, and Related Forms

Chapter 3 presents a simple organizing framework of business communication: the message-support-closure framework. It next discusses the features of letters, memos, and transmittal documents, drawing on the writing patterns analyzed in Chapter 2.

Chapter 4—Our House to Yours: Using Summaries to Inform

Chapter 4 is a respite from all that memo-writing, but surveys documents similar in form: bulletins, descriptive leaflets and flyers, and public service announcements. This discussion expands the work with *summary* begun in Chapter 2.

Chapter 5—Directions and Instructions: Writing About Process

Chapter 5 focuses on *process* writing: informative and persuasive documents explaining how to do something or how something gets accomplished. The chapter surveys posted directions, instructional pamphlets, and other examples.

Chapter 6—Using Analysis: Writing a Report

Chapter 6 explores *analysis* and its ally, *comparison.* It suggests ways to use the templates introduced in Chapter 2 and develops techniques of ensuring continuity when writing analytically. This section offers tips on constructing projects in groups.

Chapter 7—Writing the Formal Report

Chapter 7 puts into practice all the skills learned while using this book; the templates studied reappear as parts within a larger concept, and assume subordinate roles within that bigger structure. This chapter also covers research techniques, the use of traditional and electronic sources, and writing practices. Reporting on work-in-progress leads to writing the formal proposal; this document can be expanded to construct the final report.

Chapter 8—Selling Yourself

Chapter 8 extends the art of informing and persuading to one's search for employment. This chapter covers the research involved in job seeking (both in keeping a work-history file and in tracking down leads in the library). It reminds the reader that modern job searches can be greatly facilitated by new CD-ROM tools and the Internet. This chapter then looks at the components of a job seeker's arsenal: resumes, cover letters, vitae, and portfolios. The chapter discusses interviews and follow-up correspondence as well.

References

This section lists other sources of information about business and technical writing, which will enhance and augment the work begun in this text.

Appendix—Enhancing Your Document with Graphics

The appendix surveys integrating pictorial material into your document.

Acknowledgments

This little text's long genesis owes much to the students I've taught for more than twenty years who have helped me understand the challenges of teaching writing. Their energy and insights have enhanced each class. I want to commend the College of West Virginia, too, for its appreciation of my project and its support of my endeavors.

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To these folks and to all my future students, I dedicate this book.

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CHAPTER

1

Introduction

What Is "Business" or "Technical" Writing?

You are reading a document produced by following its principles; that is to say, this writing is engineered to display information effectively on the page and to get results. These are the goals of communication that this book surveys: to inform and to persuade. Such "real-world" composition differs in many ways from the academic essays assigned in college or high school English courses, though there are some overlaps. Everything written within a business and technical format is produced with the intent of achieving a targeted response: not just a grade from an instructor, but—

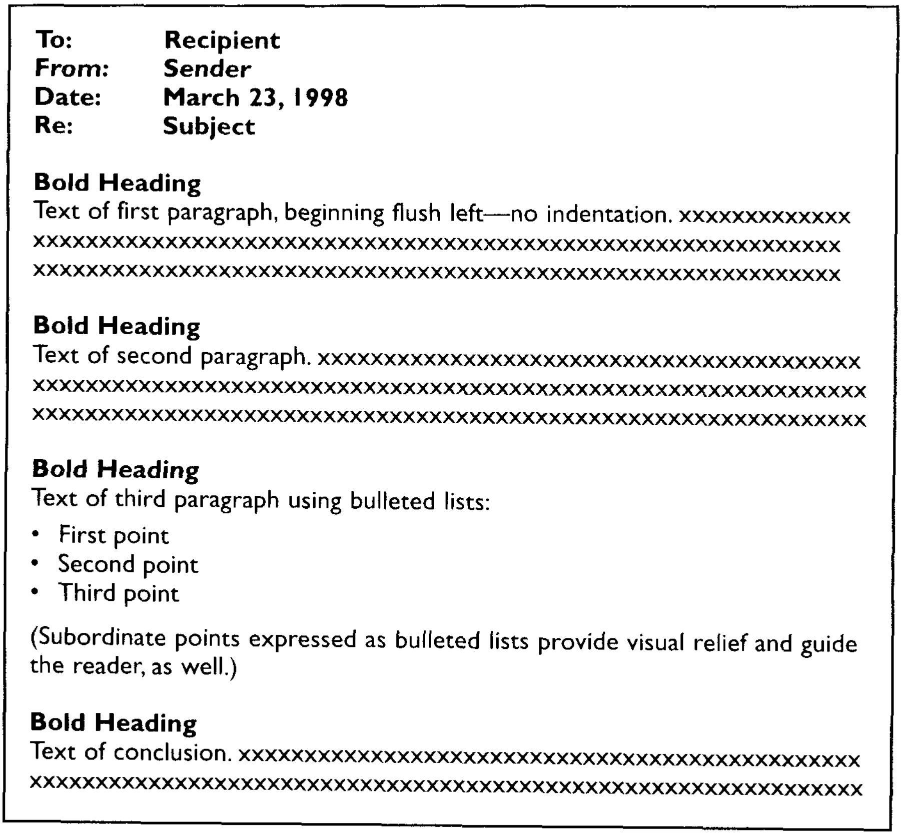
- the understanding of information,
- the acceptance of a proposal,
- the consideration of a feasibility study,
- the return of a defective item,
- the establishment of goodwill,
- the sale of merchandise, or
- the hiring of the writer!

Transactional Writing

This kind of communication might best be described as "transactional" rather than "business" or "technical." In a transaction, there are two parties. One proposes something to the other, but by accepting the ideas in that document the other party may have to give up something—money, time, even beliefs and values. The other party may have to devote valuable minutes—perhaps a lunch break—just to *reading* the proposal. As we'll see, the strategy of persuasion underpins this form of communication, since it is always difficult to convince people to act.

The first principle of persuasion is to know your audience. What are its needs, values, goals? No busy manager is going to have the time, for example, to wade

Figure 1.1 One Example of a Technical Format Using Headings and Lists to Direct the Reader



To: **Recipient**
From: **Sender**
Date: **March 23, 1998**
Re: **Subject**

Bold Heading
Text of first paragraph, beginning flush left—no indentation. xxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Bold Heading
Text of second paragraph. xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Bold Heading
Text of third paragraph using bulleted lists:

- First point
- Second point
- Third point

(Subordinate points expressed as bulleted lists provide visual relief and guide the reader, as well.)

Bold Heading
Text of conclusion. xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

through a leisurely essay that dawdles across four pages of dense type unrelieved by white space. Busy people—the targets of most transactional writing—by definition do NOT have the patience to decode the subtext of an intricate communiqué. This puts the burden on the writer, who must direct the reader, using headings to show the outline of the discussion and lists to clarify the points discussed (Figure 1.1). Such an approach encourages the reader to follow the document as it proceeds. A good transactional writer won't alienate an audience along the way, either, through a misguided choice of words.

The second persuasive principle is to know exactly what you want your audience to do. Consider what would happen if you wrote a cover letter in response to a want ad—but never demonstrated in the letter that you'd like to be hired for the job! Personnel officers in large and small corporations see hundreds of these letters.

Third, you must use clear and specific content within a business and technical format. Doing your homework and convincing the reader with detail is only half the challenge—you must also adhere to the page layout and style of presentation expected in order to get results. We'll discuss patterns and formats later.

Transactional Versus Academic Writing

Since you're probably entering this course after having taken English Composition, you'll no doubt note many things you learned in that class that transfer to business and technical writing. Both types of communication require clarity, focus, audience-awareness, development, coherence, and smooth expression—the absence of problems with word choice and grammar.

But there are many differences, which you'll notice as we work through the text. A few striking ones include:

- An "outline" form of presentation instead of an essay form.
- The use of different fonts and sizes of type to create eye relief.
- The frequent use of flush-left text instead of tabbed indentations at the beginning of paragraphs.
- Single-spaced paragraphs separated by double-spacing.
- Different styles of format.

Working Together

One of the biggest challenges in business and technical writing is that frequently the different sections of a document are contributed by different people, each having particular stylistic quirks, and each emphasizing some things that may not be important to the document as a whole. Then the group must decide how to reconcile all the parts with each other, what to enhance, what to discard, and how to integrate parts so that they become a seamless unity.

Growing a Document

In group situations, documents are often "grown" from small, isolated sections into developed, multiunit presentations: major proposals, employee handbooks, feasibility reports. Much give-and-take and many hours of reexamining the drafts produce a finished text. Many writers begin with an outline that shows the major headings in place; the supporting material under each heading is developed separately by different people; then the whole package is put together, reviewed, and re-reviewed. What looks like a natural, effortlessly produced presentation is really the product of intensive work (Figure 1.2).

Figure 1.2 Skills Required to Develop Documents Within Groups

Teamwork. Discussion must move beyond debate and disagreement to a consensus produced by mutual agreement. No one should feel "left out" of the decision making, nor should a few seek to dominate and "overpower" others.

Diversity. All approaches to the problem must be considered. Frequently there are several ways to organize the same material, and several topics under which the material may be organized.

Project Management. The group must set reasonable deadlines to complete its tasks. It must identify the skills of its members and put the appropriate members in charge of the sections of the project in which their skills will best be used. It often happens, for example, that one or two people become the final editors of a document.

Invention/Development Strategies. The group must use

- *Associational thinking* to explore all possible topics and approaches.
- *Focused thinking* to unify selected topics under one central concept, creating transitions to link topics together.
- *Reflective thinking* to assess the effectiveness of the unified presentation, and to make appropriate changes when necessary.

Using Computers

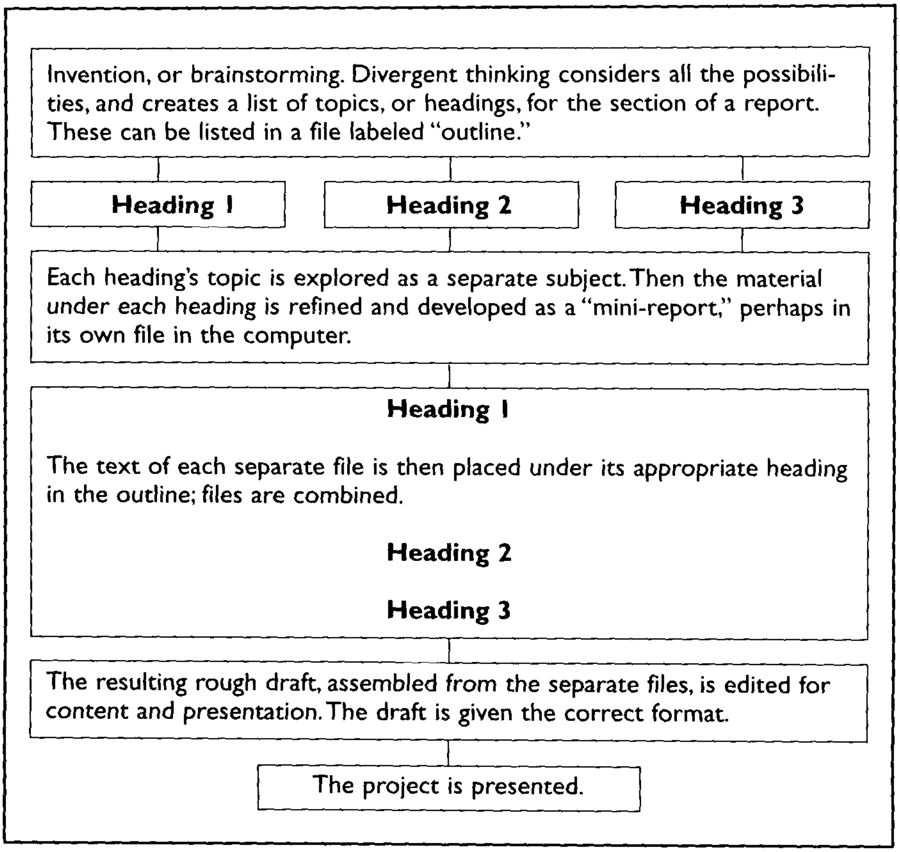
Writing by yourself, you'll undergo the same challenges. It's easiest to develop a document on disk, using a computer program with which you are familiar. Big projects often begin with material in separate files, which can, once developed, be imported into the main shell of the document. Figure 1.3 illustrates the pattern of document development.

There are other good reasons to use computers in drafting:

- *They make proofreading easier,* since you don't need to waste paper, since the text looks clear, and since programs can check your spelling.
- *They facilitate recursive writing*—that is, they let you return repeatedly to the document without having to begin anew.
- *They allow you to prepare alternate versions* of the same project so that you can pick the best one.
- They are unsurpassed in providing options for attractive format.

Current studies question whether computers can actually help your thinking as you compose, but this, too, may be a benefit for you.

Figure 1.3 A Pattern of Document Development



Invention, or brainstorming. Divergent thinking considers all the possibilities, and creates a list of topics, or headings, for the section of a report. These can be listed in a file labeled "outline."

Each heading's topic is explored as a separate subject. Then the material under each heading is refined and developed as a "mini-report," perhaps in its own file in the computer.

The text of each separate file is then placed under its appropriate heading in the outline; files are combined.

The resulting rough draft, assembled from the separate files, is edited for content and presentation. The draft is given the correct format.

The project is presented.

Saying What You Mean: A Grammar Refresher

Grammar and Usage Assist Credibility

A misplaced comma or a misspelled word might cost your report credibility, and the wrong word choice, or usage, might baffle or alienate your reader. Result-oriented writing cannot afford such mistakes. Your standard writing equipment should include a good dictionary (such as *Webster's* or *American Heritage*), a current manual of style and grammar such as the *Prentice Hall Reference Guide to Grammar and Usage*, Third Edition (by Muriel Harris), and a thesaurus, or dictionary of synonyms. Programs such as "Spell-Check" or

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