

FITS 204

FITS 204

CHARLETTE

AILA KHAN; ANNA CAPPUCCHETTI;
AND ELIZABETH HEIUSLER

[FITS 204](#) Copyright © by charlette. All Rights Reserved.

Contents

<i>FITS 204 Course Description</i>	ix
<i>Course Objectives</i>	x
<i>Course Objectives</i>	
<i>Student Learning Outcomes</i>	xii

Part I. Part 1 -Beginning of the textbook

1. Chapter 1: A Diverse Skillet Featuring Communications Is Key to Survival Communication Skills <i>Anna Cappuccitti</i>	3
2. Chapter 2: Communication Skills Desired By Employers <i>Anna Cappuccitti</i>	8

Part II. Part 2 Understanding Data & Research

3. Chapter 3 Difference between Marketing Research and Customer Insights <i>Aila Khan</i>	17
Chapter 4: Choosing a Research Methodology <i>Anna Cappuccitti</i>	27
4. Chapter 5 Secondary Research <i>Aila Khan</i>	33
5. Chapter 6 Qualitative vs Quantitative Data <i>Aila Khan</i>	39

Part III. Part 3

Researching

Chapter 7: Locating Credible Sources	49
<i>Anna Cappuccitti</i>	
Chapter 8 : Outlining Your Message	62
<i>Anna Cappuccitti</i>	
6. Chapter 9 Infographics	71
<i>Aila Khan</i>	
Chapter 10 : Substantial Revisions	79
<i>Anna Cappuccitti</i>	

Part IV. Extra Chapters

Extra reading -1 : Using Source Text: Quoting, Paraphrasing, and Summarizing	105
<i>Anna Cappuccitti</i>	
7. Extra Reading 2 - Communicating Insights or Presenting Research Results	121
<i>Aila Khan</i>	
8. Extra Reading 3 - Primary Research	132
<i>Aila Khan</i>	
9. Extra Reading 4 - Questionnaire Design	139
<i>Aila Khan</i>	
10. Extra Reading 5 - Artificial Intelligence and Information/ Research	165
<i>Aila Khan</i>	

Part V. Assignments and Project Ideas

Part VI. Part 4 Drafting

Chapter 16: Effective Document Design	181
<i>Anna Cappuccitti</i>	

Part VII. Part 5 Editing

Chapter 17: Selecting Appropriate Channels 209

Anna Cappuccitti

Chapter 19: Proofreading for Mechanics/Eli 240

Review

Anna Cappuccitti

Part VIII. Part 6 – It your Turn

Appendix 263

FITS 204 Course Description

A study of consumer behavior and fashion adoption processes in contemporary society, the nature of fashion theories, the life-cycle, social and cultural processes and evolution of fashion, and the role of fashion in the global economy in general and in the fashion business industry in particular. In addition, because of the size and reach of fashion we will recognize the cause and effects of this industry on the world's environment and inhabitants

Course Objectives

Course Objectives

- Compare the key development in apparel shopping during the twentieth century and different apparel shopping environments available to consumers the birth and evolution of changing fashions, fashion adoptions, diffusion of innovations, and consumer behaviors
- Utilize database to extract and manage economic indicator data from government and global databases.
- Examine the data compiled with available databases account to analyze consumer trends and buying patterns and establish economic movements in apparel.
- Review key variables on decision making concerning apparel purchasing and establish an understanding of post purchase behavior
- Discuss consumer misbehavior in the marketplace as it relates to social responsibility and fashion consumptions
- Reflect and critically analyze on their own

personal apparel consumption and how it impacts our environment

- Build on peer reviews and effectively use peer's evaluations on how the data is being communicated

Student Learning Outcomes

Exploring Perspectives:

Students will identify the approaches and methodologies of the disciplinary perspective, use evidence and/or knowledge generated within the disciplinary perspective to critically analyze questions, ideas, and/or arguments, and describe contributions of this perspective to finding solutions to global and/or local challenges.

Quantitative Reasoning Attribute:

Students will demonstrate competency in working with numerical information by critically analyzing quantitative information, generating ideas that are supported by quantitative evidence, assessing the relevance of data and its associated implications in a variety of contexts, and communicating those ideas and/or associated interpretations using various formats (graphs, data tables, equations, oral presentations, or written reflections).

Upon completion of this course students will be able to:

Utilize library databases with information to communicate effectively
validate their conclusions in the final paper

Prepare and present effective, informative, and persuasive to
describe the birth and evolution of changing fashions, fashion
adoptions, diffusion of innovations, and consumer behaviors and
analyze how these might shape the future of the fashion industry.

Think critically about data found in readings and databases in D2L
discussions and documents

Communicate effectively in written form on data information
found in various databases and research articles

Think critically about personal fashion consumption in final paper

Reflect and think critically of fashion value differences in D2L
discussions

Communicate effectively about the use of data on peer reviews in
the Eli Review program

PART I

PART 1 -BEGINNING OF THE TEXTBOOK

Why study and identify the approaches and methodologies of fashion, use evidence and/or knowledge generated within the fashion to critically analyze questions, ideas, and/or arguments, and describe contributions of this perspective to finding solutions to global and/or local challenges of affluenza?

- Required for greater success in other courses within the university.
- Absolutely necessary to your survival in the social and work world.
- Every job involves communicating with a variety of people.

Here are some examples of internship and entry-level roles

CHARLETTE

in our fashion industry that list communication skills as a qualification in their job postings (source: indeed.ca):

Merchandise Assistant- Saks Off 5th

- Effectively communicates with external sources

Intern; Marketing- Puma

- Good communication and people skills

Assistant Buyer- YM Inc.

- Excellent written and oral communication skills

Intern; Social Media- Canada Goose

- Effective communication skills, both written and oral

In this first part, we will cover:

1.

Chapter 1: A Diverse Skillset Featuring Communications Is Key to Survival

Communication Skills

ANNA CAPPUCCITTI

Learning Objective

1. Consider how communication skills will ensure your future professional success.

The picture painted by this insight into what employers are looking for tells us plenty about what we must do about our skillset to have a fighting chance in the fierce

competition for jobs: diversify it and keep our communication skills at a high level. Gone are the days when someone would do one or two jobs throughout their entire career. Rather, if the current job-hopping trend continues, “Canadians can expect to hold roughly 15 jobs in their careers” (Harris, 2014) and the future for many will involve gigging for several employers at once rather than for one (Mahdawi, 2017).

Futurists tell us that the “gig economy” will evolve alongside advances in AI (artificial intelligence) and automation that will phase out jobs of a routine and mechanical nature with machines. Artificial intelligence is unlikely to be a strong competitor for fashion jobs because they require high levels of creativity, problem-solving and advanced-digital skills, as well as social intelligence. The apparel industry is a powerful economic force, there is no denying that the fashion industry is changing. According to a survey by McKinsey & Co. (2019), executives described the industry as becoming digital, and fast. They also identified challenges facing the industry, such as: (1) dealing with volatility, uncertainty, and shifts in the global economy, and (2) the need to achieve greater sustainability and transparency. These results make a clear case for a major that can meet the labor demands of a growing industry by producing graduates with data-analysis and decision-making skills, fashion awareness and business acumen, and global awareness.

While the pace of change in the fashion industry is remarkable, many of the occupations it encompasses are relatively immune to replacement by automated processes and artificial intelligence. According to landmark research by Frey and Osborne (2013), art directors, fashion designers, pattern makers, and purchasing managers have

among the lowest probabilities of being replaced by computerized processes across all detailed occupation groups in the U.S. Thus, graduates will be well-positioned to take advantage of new job openings in the coming decades.

Indeed, current predictions from the Brookfield Institute for Innovation + Entrepreneurship at Ryerson University in Toronto are that 42% of Canadian jobs—especially low-paying ones—are at high risk of being affected by automation by the mid-2020s to 2030s. Some of those will be eliminated outright, but most will be redefined by requiring new skillsets that cannot be automated so easily. The 36% of jobs at low risk are those that require either advanced soft skills and emotional intelligence featured in roles such as managers, nurses, and teachers (Lamb, 2016), creativity, or advanced STEM skills in developing and servicing those technologies (Mahdawi, 2017; Riddell, 2017).

- Revenue in the Fashion segment amounts to the US \$718,027m in 2020.
- Revenue is expected to show an annual growth rate (CAGR 2020-2024) of 8.4%, resulting in a market volume of US\$991,645m by 2024.
- The market's largest segment is Apparel with a market volume of US\$460,255m in 2020.
- In global comparison, most revenue is generated in China (US\$348,700m in 2020).

Since the future of work is a series of careers and juggling several trends at once, communication skills are key to transitioning between them all. The gears of every career switch and new job added are greased by the soft skills

that help convince your new employers and clients to hire you, or, if you strike out on your own, convince your new partners and employees to work with or for you. Career changes certainly aren't the signs of catastrophe that they perhaps used to be; usually, they mark moves up the pay scale so that you end your working life where you should: far beyond where you started in terms of both your role and pay bracket.

You simply cannot make those career and gig transitions without communication skills. In other words, you will be stuck on the first floor of entry-level gigging unless you have the soft skills to lift you up and shop you around. A nurse who graduates with a diploma and enters the workforce quilting together a patchwork of part-time gigs in hospitals, care homes, clinics, and schools, for instance, won't still be exhausted by this juggling act if they have the soft skills to rise to decision-making positions in any one of those places. Though the job will be technologically assisted in ways that it never had been before with machines handling the menial dirty work, the fundamental human need for human interaction and decision-making will keep that nurse employed and upwardly mobile. The more advanced your communication skills develop as you find your way through the gig economy, the further up the pay scale you'll climb.

REFERENCES

Frey, T. (2016, April 5). *128 Things that will disappear in the*

driverless car era. Retrieved from

<http://www.futuristspeaker.com/job-opportunities/128-things-that-will-disappear-in-the-driverless-car-era/>

Government of Canada. (2017). *Explore careers by outlook*. (2017). Retrieved from <https://www.jobbank.gc.ca/wage-outlook-search-eng.do?reportOption=outlook>

Harris, P. (2014, December 4). *How many jobs do Canadians hold in a lifetime?* Workopolis. Retrieved from <https://careers.workopolis.com/advice/how-many-jobs-do-canadians-hold-in-a-lifetime/>

Lamb, C. (2016, June). *The talented Mr. Robot: The impact of automation on Canada's workforce*. The Brook-field Institute for Innovation + Entrepreneurship. Retrieved from http://brookfieldinstitute.ca/wp-content/uploads/2016/07/TalentedMrRobot_BIIE.pdf

Mahdawi, A. (2017, June 26). *What jobs will still be around in 20 years? Read this to prepare your future*. The Guardian. Retrieved from <https://www.theguardian.com/us-news/2017/jun/26/jobs-future-automation-robots-skills-creative-health>

Riddell, C. (2017, February 10). *10 high-paying jobs that will survive the robot invasion*. Retrieved from <https://careers.workopolis.com/advice/10-high-paying-jobs-will-survive-robot-invasion/>

About the Author

Anna Cappuccitti

2.

Chapter 2: Communication Skills Desired By Employers

ANNA CAPPUCCITTI

Learning Objectives

1. Identify the importance of developing effective communication skills.
2. Develop the difference between technical skills and soft skills.

If there's a shorthand reason for why you need communication skills to complement your technical skills, it's that you don't get paid without them. You need communication and "soft" skills to get work and keep working so that people continue to want to employ you

to apply your core technical skills. A diverse skill set that includes communication is really the key to survival in the modern workforce, and hiring trends bear this out.

In its Employability Skills 2000+, the Conference Board of Canada lists “the skills you need to enter, stay in, and progress” in the 21st century workplace. The first category listed is communication skills, specifically how to:

- Read and understand information presented in a variety of forms (e.g., words, graphs, charts, diagrams)
- Write and speak so others pay attention and understand
- Listen and ask questions to understand and appreciate the points of view of others
- Share information using a range of information and communications technologies (e.g., voice, e-mail, computers)
- Use relevant scientific, technological, and mathematical knowledge and skills to explain or clarify ideas (Conference Board, n.d.a)

Likewise, the non-profit National Association of Colleges and Employers in the US surveys hundreds of employers annually and has found that, in the last several years, they consistently rank the following four skills as most desirable ahead of fifth-ranked technical skills:

1. Critical thinking and problem solving
2. Professionalism and work ethic
3. Teamwork
4. Oral and written communication (NACE, 2016)

When employers include these interrelated soft skills in

job postings, it's not because they copied everyone else's job posting, but because they really want to hire people with those skills. From experience, they know that such skills directly contribute to the success of any operation no matter whether you're in the public or private sector because they help attract and retain customers and client organizations.

Traditional hiring practices filter out applicants who have poor communication skills, starting with a "written exam"—the résumé and cover letter. As documents that represent you in your physical absence, these indicate whether you are detail oriented in how you organize information and whether you can compose proper, grammatically correct sentences and paragraphs. If you pass that test, you are invited to the "oral exam," where your face-to-face conversational skills are assessed. If you prove that you have strong soft skills in this two-stage filter, especially if you come off as friendly, happy, and easy to work with in the interview, an employer will be more likely to hire you, keep you, and trust you with co-workers and clients.

The latest thinking in human resources (HR), however, is that both of those traditional filters are unreliable. Applicants can fake them. Expensive as it might be, you could get someone else to write your résumé and cover letter for you, or you can just follow a template and replace someone else's details with your own. Though most job competitions for well-paying jobs will yield exceptionally good and bad résumés and cover letters amidst a tall stack of applications, most tend to look the same because most applicants follow fairly consistent advice about how to put them together. Likewise, you can train for an interview and "fake it to make it" (Cuddy, 2012), then go back to

being your less hireable self in the workplace, only to be the first one “let go” when the next office “reorganization” comes down.

Recruiters at the most successful companies such as tech giant Google have looked at the big data on hiring and found that traditional criteria, including GPA and technical-skills test scores in the interview process, are poor predictors of how well a hire will perform and advance. New hires with only core technical skills, even if exceptionally advanced, don’t necessarily become successful employees; in fact, they are the most replaceable in any organization, especially in STEM (science, technology, engineering, and math) industries (Sena & Zimm, 2017). According to *Business Insider*, Google’s recruiters took an analytics approach like that portrayed in the 2011 film *Moneyball* and found that key predictors of success are instead personal traits, especially:

- **Adaptability:** the curiosity-driven agility to solve problems through independent, on-the-job learning
- **Resilience:** the “emotional courage” to persevere through challenges
- **Diverse background:** well-roundedness coming from exposure to multicultural influences and engagement in diverse extracurricular activities including sports
- **Friendliness:** being a “people person,” happy around others and eager to serve
- **Conscientiousness:** an inner drive to strive for detail-oriented excellence in completing tasks to a high standard without supervision (Patel, 2017)
- **Professional presence:** evidence of engaging in

- professional activities online
- **Social and emotional intelligence:** according to the CEO of Knack, a Silicon Valley start-up that uses big data and gamification in the hiring process to identify the traits of successful employees, “everything we do, and try to achieve inside organizations, requires interactions with others”; no matter what your profession or “social abilities, being able to intelligently manage the social landscape, intelligently respond to other people, read the social situation and reason with social savviness—this turns out to differentiate between people who do better and people who don’t do as well” (Nisen, 2013).

In other words, the quality of your communication skills in dealing with the various audiences that surround you in your workplace are the best predictors of professional success.

Key Takeaway

Employers value employees who excel in communication skills rather than just technical skills because, by ensuring better workplace and client relations, they contribute directly to the viability of the organization.

Exercises

1. Go to the Government (Bureau of Labor Statistics) find a chosen profession (i.e., Retail and Wholesale Buyers -6222) via the

[Explore Careers for Creative People](#). List the particular document types you will be responsible for communicating within a professional capacity by reading closely through the page. You will use this page to complete your First Reflection assignment in D2L

2. Be ready to create a Voice Thread describing yourself, favorite designer or retailer. Think about what you hope to get out of this course and how it will help you in the future.

REFERENCES

Conference Board of Canada. (n.d.a). Employability skills 2000+. Retrieved from <http://www.conferenceboard.ca/Libraries/EDUC.PUBLIC/esp2000.sflb>

Conference Board of Canada. (n.d.b). Employability skills toolkit for the self-managing learner (preview). Retrieved from <http://www.conferenceboard.ca/Libraries/PUBLIC.PDFS/es.toolkit.preview.sflb>

Cuddy, A. (2012). Your body language may shape who you are. *TED Talks*. Retrieved from https://www.ted.com/talks/amy_cuddy_your_body_language_shapes_who_you_are

Government of Canada. (2017). Explore careers by essential skills. (2017). Retrieved from https://www.jobbank.gc.ca/es_all-eng.do

National Association of Colleges and Employers. (2016, April 20). Employers identify four “must have” career readiness competencies for college graduates. Retrieved from <https://www.nacweb.org/career-readiness/competencies/employers-identify-four-must-have-career-readiness-competencies-for-college-graduates/>

Nisen, M. (2013, May 6). Moneyball at work: They've discovered what really makes a great employee. *Business Insider*. Retrieved from <http://www.businessinsider.com/big-data-in-the-workplace-2013-5>

Patel, V. (2017, August 7). Soft skills are the key to finding the most valuable employees. *Forbes*. Retrieved from <https://www.forbes.com/sites/theyec/2017/08/07/soft-skills-are-the-key-to-finding-the-most-valuable-employees/2/#5604d5c616e7>

Sena, P., & Zimm, M. (2017, September 30). Dear tech world, STEMism is hurting us. *VentureBeat*. Retrieved from <https://venturebeat.com/2017/09/30/dear-tech-world-stemism-is-hurting-us/>

About the Author

Anna Cappuccitti

PART II

PART 2 UNDERSTANDING DATA & RESEARCH

Like communication in general, good writing comes from following a process. Between an author hatching an idea and the audience reading and understanding that idea, the writing process enables the author to craft messages in a time-efficient manner that ultimately meets the needs of the audience. Without following a four-stage process — (1) understanding data & research , (2) research 7 communication, (3) drafting, and (4) editing) — an author can waste plenty of their own time writing what doesn't need to be written and wasting the reader's time by confusing them with a message that doesn't meet their needs. The next chapters deal with each of these four writing stages, dividing them into several steps that, when followed as a matter of habit, can save you time by helping

you write no more or less than you need to in achieving your professional communication goals in working with numerical information, analyzing quantitative information, and generating ideas that are supported by research evidence *data and its associated implications in a variety of contexts, and communicating those ideas and/or associated interpretations using various formats (graphs, data tables, equations, oral presentations, or written reflections)...*

Quantitative Reasoning Attribute:

Students will demonstrate competency in working with numerical information by critically analyzing quantitative information, generating ideas that are supported by quantitative evidence, assessing the relevance of data and its associated implications in a variety of contexts, and communicating those ideas and/or associated interpretations using various formats (graphs, data tables, equations, oral presentations, or written reflections).

3.

Chapter 3

Difference between Marketing Research and Customer Insights

AILA KHAN

Learning Objectives

By the end of this chapter, students must be able to:

- Recognize the emergence of the concept of Customer Insights over the years
- Identify the key differences between the Marketing Research and Customer Insights
- Identify existing forms of data for analysis

The Emergence of ‘Customer Insights’

Traditionally, marketers have used tools such as surveys, interviews, and focus groups to undertake marketing research. While these tools are still very important, they have some inherent limitations. For a start, to get good quality data from these tools a key assumption is that respondents will accurately respond to research questions. In many cases, these respondents are expected to recall a previous experience and report on it. In other situations, customers are presented with scenarios and asked to predict the likelihood of them undertaking a certain behaviour (e.g., purchase). Therefore, the key to good quality data depends on respondents’ engagement with, ability, and willingness to provide all necessary information.

Another limitation of the traditional marketing research methods is the bias that can creep in as per the wording or presentation of a question. It is well-known that responses to a question can vary depending on who is asking the question, how it is being asked, and perhaps, even the time when it is asked. Moreover, survey questions are pre-determined and offer little flexibility to bring in new ideas. Respondents are usually restricted in the way they can respond. Similarly, generating good data in an interview usually requires a good rapport between the interviewer and the participant. Not all researchers are skillful in this area.

Finally, marketing research methods are not inexpensive. It takes time, money, and expertise to design

a survey, an interview, or a focus group. Many small and medium-sized enterprises are usually not able to employ the traditional tools effectively to gather information.

The current world is making use of digital technologies. With the use of smart wallets, smartphones, smart appliances, streaming services, and social media platforms instantaneous information is being generated. This creates an ever-growing repository of ‘Big Data’ which – logically speaking – should be mined to gain insights into consumer behavior. While the traditional marketing research methods are still useful, these need to be supplemented by other forms of data which is being created and stored on a regular basis.

Many organizations have developed ‘Insights Teams’ which consist of staff members from a variety of backgrounds. As opposed to a market research department, the task with the Insights Team is to be able to ‘synthesise’ the massive amounts of data being generated. Team members play the role of aggregators, interpreters, and disseminators. It is not sufficient to only present ‘findings’ to survey questions. As an Insights specialist, the key role is to be able to aggregate different pieces of information, interpret the data by collaborating with colleagues from other departments and be able to suggest key action points for future growth.



An interactive H5P element has been excluded from

this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits2o4/?p=28#h5p-1>

THIS BOOK IS IN PROGRESS FOR FALL 2022

Flowers background picture © 2022 Western
Sydney University taken by [Sally Tsoutas](#)
[Western Sydney University Photographer](#) is
licensed under an
[Attribution-NonCommercial-NoDerivatives 4.0](#)
[International](#)

**Table: What is the difference between
Marketing Research and Customer
Insights¹?**

1. Purcell, M 2021, *What's the difference between consumer insights and marketing research?*, Greenbook, viewed 28 February 2022,
<[https://www.greenbook.org/mr/market-research-news/
whats-the-difference-between-consumer-insights-and-market-research](https://www.greenbook.org/mr/market-research-news/whats-the-difference-between-consumer-insights-and-market-research)>.

Marketing Research	Customer Insights
Greater academic focus	Industry term
Definition: the practice of collecting and analyzing data to answer distinct business questions.	Consumer Insights is the practice of using available data to derive a deeper understanding of customers which helps in effective business decision-making
Tools employed: surveys, interviews, focus groups, etc.	Available data: internal data, social media, online data, etc.
Focus is on findings	Focus is on findings and their reasons; recommendations
Focus on the original question/ research goal	Focus is on using the information to understand customer attitudes & behavior
Analyse data from each stream individually	Integrate multiple data streams
Factual information/data is summarized and forms the basis of a recommendation	Data is delivered as a story or a narrative
Focus on quantitative, qualitative, mixed methods	Has a multi-disciplinary focus
Delivers on research objectives. Used to answer specific questions.	Multi-disciplinary recommendations
Delivers data to marketing but is not involved in meetings with clients	Marketing is a business partner. Insights Team participates in client staff meetings
More popular in economies heavily reliant on manufacturing like China, Germany, Japan, Taiwan, Indonesia, Poland, and South Korea	More commonly used in service-based economies like the USA, Brazil, Bermuda, UK, Greece, Australia, Singapore
Build the research database	Give access to dashboards etc

Use of Existing Data to Gain Insights:

The concept behind ‘customer insights’ is not to gather information through traditional sources of data collection, but to mine the existing sources which generate data continuously. Some of these sources which may provide useful insights are discussed below:

Internal Sales Data

Organizations have a wealth of internal data being collected in various forms. Every time a transaction is made there is a record generated. Analysis of such sales data, revenue per customer, time, and place of sale may generate useful information for making decisions.

Customer Queries and Complaints

Every time a customer reaches out to make a query (or a complaint), a piece of data is being created. Many companies have learned that by analyzing customers’ queries and complaints a wealth of information can be mined. This includes analyzing customers’ chat transcripts or emails or voice mails.

Website Analytics

In today’s online world, customer interest in a company’s offering can be judged by web traffic and interactions. Tapping into relevant metrics may help to explain various aspects of visitors’ online behaviors (e.g., time spent on the website) as well as their interest

Previous Marketing Research Data

While some managers may toss away old research as ‘obsolete’, it is quite possible that some of the findings could prove to be useful. Qualitative data may hold some interesting insights and quantitative data could be ‘sliced and diced’ in a number of ways.

Social Media Analytics

It is expected that there will be over 4 billion social media users by the year 2025. This is more than half of the world’s population of 7.9 billion (2021). Ignoring social media is not affordable. While many organizations aim to have some presence on social media, small companies with a limited budget are still recommended to monitor – at the very least – conversations taking place on various social media platforms. Online communities, though different from Facebook and Instagram are also known to have discussions that could be vital for managers to follow.

Wearable Technologies and Smart Devices

Fitbit helps to generate wellbeing-related data while apps and smartphones can store a wealth of information. Integrating such data with other pieces of information collected is known to be helpful to marketers.

Third Party Sources of Information

Some information is shared by stakeholders across the network, while other types of information may also be available for sale. Getting consumer data, for instance from a credit card company may assist a manager in gaining a useful understanding of customers' purchases.

Employees

A company's own employees are generally the first point of face-to-face contact with a customer. Employees can provide firsthand information about the customer. There could be a wealth of information already present within a company that could be explored to better understand the customer.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=28#h5p-2>



One or more interactive elements has been excluded from this version of the text. You can view them

online here: <https://opentextbooks.library.arizona.edu/fits204/?p=28#oembed-1>

Source: Networx Brisbane ²

About the Author



Aila Khan
WESTERN SYDNEY UNIVERSITY

2. Networx Brisbane 2014, Consumer insights vs research with Donna Bonde, 31 July, online video, viewed 3 March 2022, <<https://www.youtube.com/watch?v=OnCsIRNU5xg>>.

Chapter 4: Choosing a Research Methodology

ANNA CAPPUCCITTI

Learning Objective

1. Distinguish between the primary and secondary research methodology.

The first step in research is to know what the situation calls for in terms of the formality or level of research required. Although formal research carefully documents sources with citations and references, most messages relay informal research such as when you quickly look up some information you have access to and email it to the person who requested it. Either way, you apply skills in retrieving and delivering the needed information to meet your audience's needs, often by paraphrasing or summarizing, which are extremely valuable skills coveted by employers. Knowing what research type or "methodology" the situation calls for—formal or informal research, or

primary or secondary research—in the first place will keep you on track in this still-preliminary stage of the writing process.

The research methodology where you look up information and deliver the goods in an email answering someone's question without needing to formally cite your sources is **informal research**. It is by far the most common type of research because any professional does it several times a day in their routine communication with the various audiences they serve. Say your manager emails asking you to recommend a new printer to replace the one that's not working. You're no expert on printers, but you know who to ask. You go to Erika, the admin. assistant in your previous department, and she says to definitely go with the Ricoh printer. You trust what she says, so you end your research there and pass along this recommendation to your manager. Now, because your source for the information, whom you don't necessarily need to identify in informal research, was relatively subjective and didn't explain in full why the Ricoh was better than all the other models available, you can't really have 100% confidence in the recommendation you pass along. This type of research will do in a pinch when you're short on time and your audience doesn't need to check your sources.

Formal research, on the other hand, takes a more systematic approach and documents the sources of information compiled using a conventional citation and reference system designed to make it easy for the audience to check out your sources themselves to verify their credibility. Formal research is more scientific in discovering needed information or solving a problem, beginning with a hypothesis (your main idea when you begin, which, in the case above, could be that the Ricoh

might be the best printer), and then testing that hypothesis in a rigorous way. In this case you would come up with criteria including certain features and capabilities that you need your printer to have, cost, warranty and service plan, availability, etc. Next you would look at all the accessible literature on the printers available to you, including the product webpages and specification manuals, customer reviews, and reviews from reputable sources such as *Consumer Reports*, which gets experts to test the various available models against a set of criteria. Finally, you could test the printers yourself, score them according to your assessment criteria, rank the best to worst, and report the results.

Formal research obviously requires more time, labour, practice, skill, and resources in following a rigorous procedure. In the case of the printer research above, having a subscription to *Consumer Reports* gives you access to valuable information that not everyone has. (If you simply Google-searched “best office printer,” you may get a *Consumer Reports* ranking as one of your top results, but when you follow the links, you’ll get to a subscription pricing page rather than the list you’re looking for. A large part of the internet exists on the other side of paywalls.) If you’re a college student, however, you can access *Consumer Reports* via your college library account if its journal and magazine databases include *Consumer Reports*, search for office printers, and get a handy ranking of the latest multifunctional printers for the modern office. You check out their selection criteria and determine that their number-one choice is the right printer for your needs, so you respond to your manager with the make and model number. Finally, to prove that the recommendation comes from a reputable authority, you cite the *Consumer Reports*

article showing the author, year, title, and retrieval information so that your manager can verify that you used a reputable, current source.

But why go to so much trouble? Why not just look briefly at all the options and follow your gut? Well, your gut isn't much help when you're in a difficult situation. If you're going to spend a few thousand dollars on the best printer, you're going to want to do it right. You don't want to waste money on one that has several problems that you could have known about beforehand had you done your homework. In this case, formal research ("homework") protects you against preventable losses.

Like formal *vs.* informal research, primary *vs.* secondary has much to do with the level of rigor. Basically, **primary research** generates new knowledge and secondary research applies it. In the above case, the authors of the *Consumer Reports* article conducted primary research because they came up with the assessment criteria, arranged for access to all the printers, tested and scored each according to how well they performed against each criterion, analyzed the data, determined the ranking of best to worst printer on the market, and reported it in a published article. If you can't conduct primary research yourself because you don't have easy access to all the printers worth considering, you are thankful someone else has and would even pay money for that information.

Other forms of primary research include surveys of randomly sampled people to gauge general attitudes on certain subjects and lab experiments that follow the scientific method. If a pharmaceutical company is researching a new treatment option for a particular health condition, for instance, it starts in the chemistry lab producing a compound that could be put in a pill, tests its

safety on animal subjects, then runs human trials where it's given to a controlled group. Some are given a placebo without knowing it (making them "blind") by someone on the research team who also doesn't know whether it's the real pill or the placebo (making the study "double blind"). Close observations of the effects on people with the condition and without, having taken the new pill and the placebo, determines whether the new drug is actually effective and safe. Primary research is labour-intensive, typically expensive, and may include aspects of secondary research if referring to previous primary research.

Secondary research is what most people—especially students—do when they have academic or professional tasks because it involves finding and using primary research. To use the printer example above, accessing the *Consumer Reports* article and using its recommendation to make a case for office printer selection was secondary research. Depending on whether that secondary research is informal or formal, it may or may not cite and reference sources.

The easiest, most common, and most expedient research, the kind that the vast majority of informative workplace communication involves, is **informal secondary research**. As when an employee sends company pricing and scheduling information in response to a request from a potential customer, informal secondary research involves quickly retrieving and relaying information without citing it—not out of laziness or intentional plagiarism, but because formal citations are neither necessary nor even expected by the audience. When you do a school research assignment requiring you to document your sources, however, and if your manager requires you to cite the sources you used as a basis for

endorsing an office printer in a recommendation report (because it will be an expensive investment), for example, you perform **formal secondary** research. In business, the latter type is best for ensuring that company resources are used appropriately and can be supported by all stakeholders. In other words, formal secondary research is a necessary part of a business's due diligence. In the following section, we will break down the labour-intensive process of building a document around source material collected through formal secondary research.

Key Takeaway

Determine the most appropriate research methodology—primary and/or secondary for your audience and purpose depending on the level of research required.

Exercise

1. Go to your library website at the [University of Arizona](#) and find the “Fashion” subject guide. Become familiar with 3 key databases that are recommended there that would be useful for assignments. Next list these databases with a small description in your Padlet.

About the Author

Anna Cappuccitti

Chapter 5 Secondary Research

AILA KHAN

Learning Objectives

By the end of this chapter, students must be able to:

- Explain the concept of secondary research
- Highlight the key benefits and limitations of secondary research
- Evaluate different sources of secondary data

What is Secondary Research?

In situations where the researcher has not been involved in the data gathering process (primary research), one may have to rely on existing information and data to arrive at specific research conclusions or outcomes. Secondary

research, also known as desk research, is a research method that involves the use of information previously collected for another research purpose.

In this chapter, we are going to explain what secondary research is, how it works, and share some examples of it in practice.



Marketing textbook © 2022 Western Sydney University taken by [Sally Tsoutas Western Sydney University Photographer](#) is licensed under an [Attribution-NonCommercial-NoDerivatives 4.0 International](#)

Sources of Secondary Data

The two main sources of secondary data are:

- Internal sources
- External sources

Internal sources of secondary data exist within the organization. There could be reports, previous research findings, or old documents which may still be used to understand a particular phenomenon. This information may only be available to the organization's members and could be a valuable asset.

External sources of secondary data lie outside the organization and refer to information held at the public library, government departments, council offices, various associations as well as in newspapers or journal articles.

Benefits of using Secondary Data

It is only logical for researchers to look for secondary information thoroughly before investing their time and resources in collecting primary data. In academic research, scholars are not permitted to move to the next stage till they demonstrate they have undertaken a review of all previous studies. Suppose a researcher would like to examine the characteristics of a migrant population in the Western Sydney region. The following pieces of information are already available in various reports generated from the Australian Bureau of Statistics' census data:

- Birthplace of residents
- Language spoken at home by residents
- Family size
- Income levels
- Level of education

By accessing such readily available secondary data, the

researcher is able to save time, money, and effort. When the data comes from a reputable source, it further adds to the researchers' credibility of identifying a trustworthy source of information.

Evaluation of Secondary Data

1

Assessing secondary data is important. It may not always be available free of cost. The following factors must be considered as these relate to the reliability and validity of research results, such as whether:

- the source is trusted
- the sample characteristics, time of collection, and response rate (if relevant) of the data are appropriate
- the methods of data collection are appropriate and acceptable in your discipline
- the data were collected in a consistent way
- any data coding or modification is appropriate and sufficient
- the documentation of the original study in which the data were collected is detailed enough for you to assess its quality
- there is enough information in the metadata or data to properly cite the original source.

In addition to the above-mentioned points, some practical issues which need to be evaluated include the cost of

1. Griffith University n.d., *Research data: get started*, viewed 28 February 2022, <<https://libraryguides.griffith.edu.au/finddata>>.

accessing and the time frame involved in getting access to the data is relevant.



The infographic [Secondary Sources](#) created by [Shonn M. Haren, 2015](#) is licensed under a [Creative Commons Attribution 4.0 International Licence](#) ²

Table 2: Differences between Primary and Secondary Research

3

2. Shonnmaren n.d., *Secondary sources*, viewed 28 February 2020, Wikimedia Commons, <https://commons.wikimedia.org/wiki/File:Secondary_Sources.png>
3. Qualtrics XM n.d., *Secondary research: definition, methods and examples*, viewed 28 February 2022, <<https://www.qualtrics.com/au/experience-management/research/secondary->

Primary Research

First-hand research to collect data. May require a lot of time

Creates raw data that the researcher owns

Relevant to the goals of the research

The researcher conducts research. May be subject to researcher bias

Can be expensive to carry out



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=34#h5p-5>

About the Author



Aila Khan
WESTERN SYDNEY UNIVERSITY

research/#::~text=Unlike%20primary%20research%2C%20secondary%20research,secondary%20research%20have%20their%20places>.

5.

Chapter 6

Qualitative vs Quantitative Data

AILA KHAN

Learning Objectives

By the end of this chapter, students must be able to:

- Differentiate between qualitative and quantitative data
- Choose the appropriate method for different research questions
- Recognize limitations of qualitative and quantitative research

Qualitative and Quantitative Data



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://opentextbooks.library.arizona.edu/fits204/?p=39#oembed-1>

Source: Deakin University ¹

One of the main categories used to classify information is whether it is quantitative or qualitative. In many situations, researchers combine the two methods to arrive at ‘mixed-methods research’. In the discussion below, we look at the differences between the two types of data and the situations in which these two types of data can be usefully sourced.

What is qualitative data?

Qualitative data involves a descriptive judgment using concept words instead of numbers. Gender, country name, animal species, and emotional state, feelings, and opinions are examples of qualitative information.

1. Deakin University 2020, *Quantitative and qualitative: what's the difference?*, 21 August, online video, viewed 4 March 2022, <<https://www.youtube.com/watch?v=4iws9XCyTEk>>.

What is quantitative data?

Quantitative data involves a measurable quantity, that is numbers are used. Some examples are temperature, time, the amount spent, number of units bought and hours spent on the computer.



An interactive H₅P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits2o4/?p=39#h5p-7>

Table 2: Differences between qualitative and quantitative research

Qualitative	Quantitative
Based on focus groups, interviews, case studies, expert opinion	Based on surveys, polls
Uses open-ended questions	Uses closed-ended (yes/no) and multiple-choice questions
Helps formulate a theory to be researched	Tests and confirms a formulated theory
Findings are presented as themes (text)	Findings are presented in statistical format (numbers, tables, graphs)
Fewer respondents needed	Many respondents needed
Harder to replicate	Easy to replicate
Less suitable for sensitive data: respondents may be biased, too familiar, or inclined to leak information	Ideal for sensitive data as it can be anonymized and secured

Which type of data to collect?

Generally, the choice of data is directly linked to the research question being investigated. Below are some general guidelines on the kind of information produced with the help of different methods:

Qualitative research: is mostly used to understand a phenomenon, such as customers’ experiences at a retail outlet. For example, a researcher may choose to interview a number of shoppers by asking them open text questions,

e.g. “*Did you face any problems in this store today?*” or “*Did you enjoy shopping here?*” Such questions may encourage customers to chat freely and highlight any issues (e.g., parking issues, rude employees, or poor ventilation) which at times cannot be identified through a quantitative survey alone.

Quantitative research: is useful in estimating overall frequencies or numbers. For example, how many people visited the restaurant this evening? It is also used to test or confirm a hypothesis – that is, a manager’s educated guess. For example, a teacher may survey his class, asking them, “On a scale of 1-5, how bored are you in this class? (with 1 = not at all bored and 5 = very bored)” By analysing the numerical responses, the teacher may conclude that his guess is accurate about student boredom as the average class score is 4.5.

Mixed method: as the name suggests makes use of both qualitative and quantitative research. A researcher may use qualitative research to better understand a phenomenon, and then use quantitative research to statistically test it. For instance, while interviewing customers a manager may find that some of them are complaining about parking issues. In order to understand how widespread this complaint is the manager may initiate a quick, short survey to find out how many customers require parking at the store’s premises.

Alternatively, a researcher may stumble upon an unexpected finding via a survey (such as very low scores for customer service in a Sydney store). Interviews can be conducted to find out the reason for customer dissatisfaction. The store manager may find it useful to

initiate conversations with customers to better understand the poor scores.



An interactive H₅P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=39#h5p-8>

Limitations of qualitative research

- **Subjectivity:** Qualitative data is written or spoken and requires careful interpretation. In some situations, the researcher may not be familiar with the participants' language. Analysing the data may require time and help from someone who is from the community and fluent at conversing in the relevant language. Even when language is not an issue, interpretation of textual content can be done differently by different researchers.
- **A smaller number of participants:** Interviews and focus groups can only be conducted with a smaller group of participants. While surveys can be sent out and completed by hundreds (or thousands) of people, it is simply not possible to undertake interviews with the same number of informants. Thus, any findings from qualitative

research need to be generalized with care.

- **Bias:** The researcher or analyst plays a much bigger role in the interpretation of qualitative information than simply running a statistical test. At times, the interviewee may make a very important point but mention it only once – and that too, casually. While it is easy for a novice researcher to completely miss such information, a more experienced researcher would make a note of it.

Limitations of quantitative research

- **Large sample size:** In order for quantitative research to be statistically valid, a large number of respondents must be included in the survey. While there is no exact figure which is seen as being accurate, the larger the sample size the greater would be the confidence in the findings. This requires a large number of resources in terms of skills at designing the research project, time, and money.
- **Pre-determined questions:** When a large survey has to be undertaken, all questions in the survey need to be pre-determined. In case the researcher wants to include any additional questions, it is not possible to do it in a short period of time.

CHARLETTE

About the Author



Aila Khan
WESTERN SYDNEY UNIVERSITY

PART III

PART 3 RESEARCHING

Once you've identified your purpose for writing, profiled your audience, and selected the appropriate channel, next you must gather the information that your audience needs. From the shortest informative email to the sprawling analytical report, most professional messages involve relaying information that was looked up—that is, they involve research. Employers value employees who are resourceful, whose research skills go well beyond Google-searching on the internet and focusing on the top few results, like anyone can do. Whether such in-demand employees get the needed information from a book or database from a library, an article from a journal, or simply by asking a reputable authority such as a veteran co-worker, they prove their value by knowing where to find credible information, how to use it appropriately, and how to document it.

In this part, we will cover:

CHARLETTE

- [Choosing a Research Methodology](#)
- [Locating Credible Sources](#)
- [Using Source Text: Quoting, Paraphrasing, and Summarizing](#)
- [Documenting Sources in APA](#)

Chapter 7: Locating Credible Sources

ANNA CAPPUCCITTI

Learning Objective

1. Locate, select and organize relevant, current and accurate information from a variety of credible sources.

Once you've selected the appropriate research methodology, your next task is to search for sources that can be taken seriously by your audiences and, in so doing, narrow down your topic. Research is largely a process of sorting out the wheat from the chaff, then processing that wheat into a wholesome product people will buy and digest. Appropriately using credible sources reflects well on your own credibility, whereas using suspicious sources—perhaps because they were the top results of a Google-search filtered by an algorithm informed by your search history, which may show that you haven't been much concerned with quality sources—undermines your own authority.

A research document full of dubious sources makes you

look uneducated, lazy, flakey, or gullible at best, or at worst conniving and deceptive. We're in an age that some have dubbed the "post-truth era" where "fake news" churned out by clickbait-driven edutainment outlets can be a major determining factor in the course of history (White, 2017). Building the critical-thinking skills to distinguish truth from lies, good ideas from bad, facts from propaganda, objective viewpoints from spin, and credible sources from dubious ones is not only an academic or civic duty but also key to our collective survival. Learning how to navigate these perilous waters is one of the most important skills we can learn in school.

College or public libraries and their online databases are excellent places to find quality sources, and you should familiarize yourself with their features such as subject guides and advanced search filters. Even libraries are populated by sources outside the realm of respectability, however, because they cater to diverse stakeholders and interests by being comprehensive, including entertainment materials in their collections. They also have holdings that are horribly out of date and only of historical interest. Whether in the library or on the open internet, the only real way to ensure that a source is worth using is to develop critical thinking skills in knowing what to look for in sorting the wheat from the chaff.

Assessing the Credibility of Library Sources

Developing a good sense of what sources are trustworthy takes time, often through seeing patterns of approval in how diligent professionals rely on certain sources for credible information. If you continue to see respected

professionals cite articles in *Scientific American* and *The Economist*, for instance, you can be reasonably assured of those sources' credibility. If you see few or no professionals cite *Popular Mechanics* or *Infowars* and you also see non-professionals cite fantastic, sensational, or shocking stories from them in social media, you have good reason to suspect their reliability. The same goes for sources regarding certain issues; if 97% of relevant scientists confirm that global climate change results from human activity ([Cook et al., 2016](#)), for instance, sources representing or championing the 3% opposition will be seen as lacking credibility. Patterns of source approval take time to track, but you can count on many more immediate ways of assessing credibility in the meantime.

The following indicators are worth considering when assessing print sources (and some online sources, but we will deal with them separately after) because they usually all align in credible sources:

- **Author credentials:** If the author is identified by name and credentials, you can verify whether they are expert enough on the topic to be a credible authority.
 - Generally, the higher the credential or industry position an author holds, the more credible you can expect them to be. An author with a PhD (doctoral credential) in psychology will be a credible authority on matters of psychology because they have legitimate expertise. A talk-show host, on the other hand, lacks credibility and expertise on such topics since they don't have the

same years of focused study, training, and clinical practice in the field. The PhD is a more advanced credential than a master's degree, which is more advanced than an undergrad (four-year bachelor's) degree, which is more advanced than a college diploma or certificate, which is more advanced than a high school diploma. In the absence of more detailed information, you can roughly gauge how credible an authority someone is on a topic based on where they fall on that spectrum of education.

- Years of successful industry experience is also a trustworthy credential. If the author of a trade journal or blog article has 35 years of experience in the industry, 20 of those as an owner of a thriving business, you can expect expert knowledge from them if their topic is on matters directly related to their profession.
- Likewise, a blogger can only be taken seriously if they are a working professional writing about their work and shouldn't be relied on outside of their area of expertise.
- A blogging hobbyist might have some interesting things to say, but without expert training and credentials, their word doesn't carry much weight. If a backyard astronomer discovers something major in the night sky, for

instance, it takes verification and systematic cataloguing from credentialed astronomers employed by renowned institutions before the discovery is considered real.

- **Currency:** Depending on the topic, how recently the source was published can be a key indicator of credibility.
 - A book on communications technology from 1959 is no longer a relevant authority on communications because technology has changed so much since then.
 - In technology fields generally, a source may be considered current if it was published in the past 5-10 years; in some sub-disciplines, especially in computing, currency may be reduced to more like 1-2 years depending on how fast the technology is advancing. Disciplines that advance at a slower pace may have major sources still current even after 15-20 years because nothing has since come along to replace them.
- **Author objectivity:** If the author argues entirely on one side of a debate on which experts disagree, be suspicious of the source's credibility.
 - If the author identifies the other sides of a debate and convincingly challenges them with strong evidence and sound reasoning, then their work is worth

considering.

- If the author ignores the controversy altogether, summarily dismisses alternative points of view out of hand, offers dubious arguments driven by logical fallacies, simplifies complex issues by washing out any nuance, or appears to be driven more by profit motive than dedication to the truth, then the audience will become suspicious. Using such an extremely slanted source will undermine your own credibility.
- Company websites, especially for smaller businesses, are generally suspect because their main goal is to attract customers and, ultimately, profit, so they're not going to focus too much on information that may give potential customers reason to think twice no matter how legitimate it is. A home security alarm company, for instance, is probably not going to post crime statistics in an area that has record-low criminal activity because people will conclude that home security is a non-issue and therefore not worth spending money on. The company is more likely to sidestep rational appeal and prey instead on fears and anxieties by dramatizing scenarios in which your home and loved-ones are violated by criminals. If the company website focuses on education, however, by explaining what to look for to assess the credibility of the

professional you're seeking, then you are probably looking at a successful operation that does quality work and doesn't need to fleece you in order to survive.

- **Publisher quality:** If the source publisher is an established, long-running, big-city (e.g., New York or Toronto) or university press with a large catalogue, you can be reasonably assured that the source underwent an editorial process that helped improve its validity.
 - Run a quick background check on the publisher by looking up their website and some other sources on them such as the *Wikipedia* articles via its [List of English-language book publishing companies](#) (2018) and [List of university presses](#) (2018). Since this is quick, informal secondary research, you need not document this research unless you were writing a report specifically on their credibility.
 - An editorial process means that more people besides the author reviewed the work for quality assurance prior to publishing.
 - A self-published (“vanity press”) book lacking that constructive criticism, however, wouldn't necessarily have had the benefit of other people moderating the author's ideas and pushing them towards expert consensus.

- If the publisher isn't a university press or operates outside of the expensive New York City zip code, however, that's not necessarily a guarantee that it lacks credibility, but you may want to do a background check to ensure that it's not a publisher with a catalog of, say, white-supremacist, conspiracy theorist, or climate change-denying literature. Likewise, if you see that the source is sponsored and/or promoted by special interests like Big Oil or a far-left extremist group, for instance, your suspicions should be raised about the validity of the content.
- See Cornell University Library's [Distinguishing Scholarly from Non-Scholarly Periodicals: A Checklist of Criteria](#) (2017).
- **Peer review:** Any source that undergoes the peer-review process requires the author to make changes suggested by credentialed experts in the field called upon by the publisher. This process ensures that author errors are corrected before the text is published and hence improves both its quality and credibility.
- **Writing quality:** The quality of the writing is another indicator of credibility because it also suggests that the source underwent an editorial process to ensure quality and respectability.
 - A poorly written document, on the other hand, suggests that the author was alone and isn't a strong enough writer to

proofread on their own, or that no one involved in its publication was educated enough or cared enough about details to bother correcting writing errors.

- Consider the connection between the quality of one's writing with the quality of their thinking. If your writing is organized and well structured, abides by accepted conventions, and is error-free, your thinking tends towards all such qualities too. If someone's writing is a mess and rife with errors, on the other hand, it often betrays a scattered and careless mind.
- Notice that quality publications will have very few if any writing errors.
- **References:** If a source identifies its sources and all of them meet the credibility standards outlined above, then you can be reasonably certain that the effort the source author made towards formal secondary research ensures their credibility.
 - If the source doesn't identify sources, however, or is vague about them (e.g., with expressions like "research shows that ...," "studies have proven that ...," or "experts say that ..."), then you should question why the author hasn't bothered to cite those research studies or name those experts. Of course, it may be because they don't have the time and space to cite sources properly in the

platform they're writing. But it may also be because they're lazy in their research or because they're making it up for self-serving purposes.

Assessing the Credibility of Online Sources

Online sources pose special challenges to students and professionals conducting research, since most will expediently conduct research entirely online where some of the above indicators of credibility must be rethought a little. Sometimes the author isn't revealed on a webpage, perhaps because it's a company or organization's website, in which case your scrutiny shifts to the organization, its potential biases, and its agenda. A research project on electronic surveillance, for instance, might turn up the websites of companies selling monitoring systems, in which case you must be wary of any facts or statistics (especially uncited ones, but even cited sources) they use because they will likely be cherry-picked to help sell products and services. And instead of checking the publisher as you would for a print source, you could consider the domain name; websites with .edu or .gov URL endings usually have higher standards of credibility for the information they publish than sites ending with .com or .org, which are typically the province of commercial enterprises (as in the monitoring systems example above) and special interest groups with unique agendas.

Although successful in being a comprehensive repository of knowledge, *Wikipedia.org*, for instance, is not generally considered credible and should therefore not

appear as a source in a research document unless it's for a topic so new or niche that no other credible sources for it exist. By the organization's own admission, "*Wikipedia* cannot guarantee the validity of the information found [on their site]." The Web 2.0, user-generated nature of *Wikipedia* means that its articles are susceptible to vandalism or content changes inconsistent with expert opinion, and they aren't improved by any formal peer-review process ([Wikipedia, 2015](#)). *Wikipedia* sacrifices credibility for comprehensiveness. For these reasons, a *Wikipedia* article in a research report is a little laughable; few will take you seriously if they see it there because you will look lazy for stopping at the first available source.

A final indicator of credibility for online sources, similar to the writing-quality check discussed above, is the overall design quality of the website. The attractiveness of a site may be subjective, but a user-friendly and modern design suggests that money was spent relatively recently on improving its quality. If the site looks like it was designed 10-15 years ago and hasn't been updated, you can suspect that it's lost its currency. Some websites look dated despite their content still being relevant, however, because that content doesn't change drastically over time.

Key Takeaway

Investigating and narrowing down a research topic involves using databases to locate reputable sources using criteria to assess for credibility such as the quality of the source author, writing, references, and publisher.

Exercises

As stated in D2L – first do the PlayPosits on “Using Data Search” . After you completed the reading , PlayPosits on Using Data Search, now you should be able to review Discussion Question # 3 and to post an answer .

- **Playposits:**
 - **Using Data Search**
- **Complete Discussion 3**

References

Cook, J., et al. (2016, April 13). Consensus on consensus: A synthesis of consensus estimates on human-caused global warming. *Environmental Research Letters* 11, 1-7. Retrieved from <http://iopscience.iop.org/article/10.1088/1748-9326/11/4/048002/pdf>

Cornell University Library. (2017, September 7). Distinguishing scholarly from non-scholarly periodicals: A checklist of criteria. Retrieved from <http://guides.library.cornell.edu/scholarlyjournals>.

White, A. (2017, January 10). Fake news: Facebook and matters of fact in the post-truth era. *Ethics in the News: EJN Report on Challenges for Journalism in the Post-truth Era*. Retrieved from <http://ethicaljournalismnetwork.org/resources/publications/ethics-in-the-news/fake-news>

Wikipedia. (2015, December 17). General disclaimer.
Retrieved from [https://en.wikipedia.org/wiki/
Wikipedia:General_disclaimer](https://en.wikipedia.org/wiki/Wikipedia:General_disclaimer)

Wikipedia. (2017, October 21). List of English-language book
publishing companies. Retrieved from
[https://en.wikipedia.org/wiki/List_of_English-
language_book_publishing_companies](https://en.wikipedia.org/wiki/List_of_English-language_book_publishing_companies)

Wikipedia. (2017, November 18). List of university presses.
Retrieved from [https://en.wikipedia.org/wiki/
List_of_university_presses](https://en.wikipedia.org/wiki/List_of_university_presses)

About the Author

Anna Cappuccitti

Chapter 8 : Outlining Your Message

ANNA CAPPUCCITTI

Learning Objective

1. Apply outlining techniques to begin drafting a document.

Once you've clarified the organizing principle of your message, outlining with hierarchical notes helps you plot out the bare-bones structure of the message's full scope so that you can flesh it out into full sentences and paragraphs shortly after. Outlining helps you get past one of the most terrifying moments in any student's or professional's job, especially when beginning a large writing project: writer's block. Even after completing all the other steps of the writing process explored above, freezing up while staring down a blank screen is an anxiety-driven mental bottleneck that often comes from either lacking anything to say because you haven't researched the topic, or thinking that your draft writing has to come out perfectly

just as the reader will see it by the end of the process. It absolutely doesn't. Drafting is supposed to produce a sketchy, disappointing mess only because the goal at this stage is to get ideas down fast so that you can fix them up later in the editing stage.

Outlining is a structured brainstorming activity that helps keep you on track by assigning major, overarching ideas and relatively minor, supporting points to their proper places in the framework of your chosen organizing principle. At its most basic form for a three-part message, an outline looks like the following:

- I. Opening
 - A. Point 1
 - B. Point 2
- II. Body (Background, Details and Context)
 - A. Point 1
 - 1. Subpoint 1
 - 2. Subpoint 2
 - i. Sub-subpoint 1
 - ii. Sub-subpoint 2
 - a. Sub-sub-subpoint 1
 - b. Sub-sub-subpoint 2
 - c. Sub-sub-subpoint 3
 - iii. Sub-subpoint 3
 - 3. Subpoint 3
 - B. Point 2
 - 1. Subpoint 1
 - 2. Subpoint 2
 - 3. Subpoint 3

III. Closing

A. Point 1

B. Point 2

You can add further points in the body and, as shown in the middle of the above outline template, subdivide them even further with lowercase roman numerals, regular numbers, lowercase letters, etc. depending on the size of the document and the support needed. Even when drafting a short email, throwing down a few point-form words as soon as you think of them, arranged in the basic three-part message structure, can help you get started, especially if you don't have time to write the full email as soon as you think of it (or respond to one as soon as you read it) but nonetheless need to get some quick ideas down before you forget so that you can expand on those points later when you have time. For instance, if it occurs to you that subscribing to a snow-removal service might be a good idea and quickly draft an email on the weekend while doing several other winterizing chores, it may look like the one in the left column of Table 12.1 below.

Table 12.1: Brief Message Outline as a Basis for an Email Draft

Message Outline	Email Message Draft
<ol style="list-style-type: none"> 1. Interested 2. Our details <ol style="list-style-type: none"> a. address b. driveway 3. Questions: <ol style="list-style-type: none"> a. prepaid cost vs. one-time? b. discounts? 	<p>Greetings! I am interested in your snow-removal service this winter. We're at 5034 Tofino Crescent, and our driveway can fit four cars, so how much would that come to for the prepaid service?</p> <p>Alternatively, if we decide to do the snow removal ourselves for most of the winter but are in a jam at some point, is it possible to call you for one-time snow removal? How much would that be? Also, do you offer any discounts for first-time customers?</p> <p>Warm regards, Christine Cook</p>

However numbered, the hierarchical structure of these notes is like the scaffolding that holds you up as you construct a building from the inside out, knowing that you will just remove that scaffolding when its exterior is complete. Once the outline is in place, you can likewise just delete the numbering and flesh out the points into full sentences, such as those in the email message in the second column of Table 12.1 above, as well as add the other conventional email message components.

The specific architecture of the outline depends on the organizing principle you've chosen as appropriate for your writing purpose. In the case of the 10 common organizing principles used throughout the Wolfe Landscaping & Snowblowing website example in [Table 12.1](#) above, Table 12.2 below shows how the outline for each of the first three

CHARLETTE

principles keeps each piece organized prior to being
fleshed out into sentences.

**Table 12.2: Outline Possibilities
Based on Organizing Principles**

Organizing Principle	Outline
I. Chronology & 5W+H	<ul style="list-style-type: none"> I. Past <ul style="list-style-type: none"> A. Founding: who, when, what, and why B. Origin and expansion: where, when, and how II. Present <ul style="list-style-type: none"> A. Coverage: where B. Technology: what III. Future: where and when
2. Comparison & Contrast	<ul style="list-style-type: none"> I. Main idea: Wolfe is better than the competition II. Background context/details: Comparison-Contrast <ul style="list-style-type: none"> A. Comparison: what all companies do—clear your driveway B. Contrast: how Wolfe does it better <ul style="list-style-type: none"> i. Follows the city plow ii. Does your street parking iii. Offers walkway shoveling and salting iv. 10% cheaper for base service III. Conclusion: Wolfe wins, no contest!

- I. FAQ: Why get snow removal?
 - II. Pros & Cons
 - A. Advantages
 - i. professional driveway clearing
 - ii. 24/7 service
 - iii. saves time
 - iv. avoids injury
 - B. Disadvantages
 - i. expense
 - ii. potential property damage
 - 3. Pros & Cons
 - III. Concluding recommendation: get the service
-

As we shall see later in the textbook, outlining is key to organizing other projects such as presentations and writing a document. If your task is to do a 20-minute presentation, preparing for it involves outlining your topic so that you can plot out the full scope of your speech, then fleshing out that outline into a coherent script with smooth transitions linking each point and subpoint. If it takes you 15 minutes to read that first version of the script out loud, then you simply add a third more material in the form of points in areas that need more development in your outline, then script them out into five more minutes of speech. But if it takes a half hour to read the first version of the script, then you know that you need to pare it down, chopping about a third of its length. Outlining and scripting prior to building a PowerPoint for a 20-minute presentation that would take you a half hour to present would save you the time of making slides for material that

would have to be cut out anyway. In this way, outlining keeps you on track to prevent wasted efforts.

Key Takeaway

Begin your draft by outlining the major and minor points in a framework based on the organizing principle appropriate for your purpose so that you can flesh it out into full draft sentences after.

Exercise

1. Your assignment is to (Go to Eli Review) write and present a persuasive speech and presentation on affluenza , try organizing your major and minor points in an outline.
- 2.Next, place your outline in your Assignment Dropbox (read the assignment prior to tuning it into your dropbox)

About the Author

Anna Cappuccitti

6.

Chapter 9 Infographics

AILA KHAN

Learning Objectives

By the end of this chapter, students must be able to:

- understand the importance of using infographics
- be familiar with the key elements of an effective infographic



One or more interactive elements has been excluded from this version of the text. You can view them

online here: <https://opentextbooks.library.arizona.edu/fits204/?p=76#oembed-1>

Source: Visme¹

What is an infographic?

Infographics visually communicate complex data and information in a graphic format that is easy to read and understand. They often combine illustrations, icons, and data visualisations to engage the reader. They are used very effectively in online settings to convey information whilst using minimal text.

Infographics are an important tool due to the reasons explained below:

Processing Information



According to the theory of the picture superiority effect, humans are able to decipher visual information 60,000 times faster than text. The human brain is wired in such a

1. Visme 2019, *The 14 dos and don'ts to design beautiful and effective infographics*, 8 Oct, online video, viewed 30 May 2022, <<https://www.youtube.com/watch?v=uBBmbdPbfhw>>.

way that handling visual information is easier for it. As a result, images are more likely to be remembered than words.

Information Overload



In today's era of information overload, a marketer's message needs to stand out in the competitive landscape. It needs to be memorable. It is an information jungle out there, and coming across an easy-to-follow graphic is a relief (as narrated in a TedTalk by David McCandless)

Communicating with the Digital Natives



Millennials and similar age groups have grown up with technology. They prefer communication that involves brief, instantaneous messages. They shift their focus to other sources of information very quickly. Lengthy oral lectures or huge written texts may not work well with a generation that has a low tolerance for boredom.

Easily Shareable

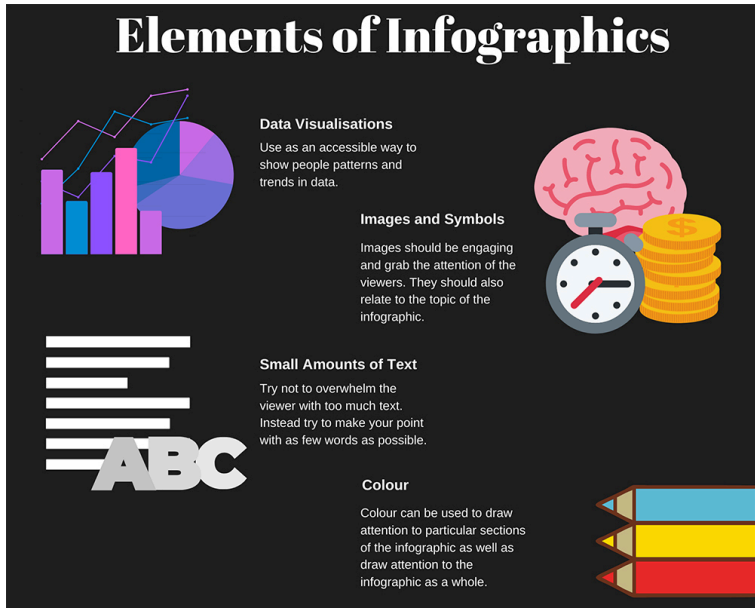


Infographics are easier to share on social media and other platforms. It is far more likely that your key message in an infographic will reach a larger audience than in a lengthy article.

Elements of an Infographic

The following material is derived from Curtin University² and is used under a [Creative Commons Attribution ShareAlike 4.0 Licence](https://creativecommons.org/licenses/by-sa/4.0/).

2. Curtin University 2020, *Visual communication*, viewed 11 May 2022, <<https://libguides.library.curtin.edu.au/23things/visual-communication>>



Creating an Infographic

The following steps are taken in the creation of an infographic:

Step 1 – Preparation:

What is the main aim behind making the infographic?
What is the key message which needs to be communicated?

Step 2 – Planning:

This involves preparing an outline for the infographic.
Deciding on the key content which should be included.

This content must address the aims/objectives articulated in Step 1

Step 3 – Development:

Using the most appropriate software to develop the infographic

Step 4 – Evaluation:

Some key criteria are discussed in the section below. It would be useful to also benchmark the infographic with another one in the industry

Step 5 – Publication/Dissemination:

An infographic is useful if it reaches the intended audience. Ensuring that it can be easily shared may also help in disseminating the message

Evaluating an Infographic:

The following material is derived from University of Guelph 2022³ and is used under a [Creative Commons Attribution ShareAlike 4.0 Licence](https://creativecommons.org/licenses/by-sa/4.0/).

When evaluating an infographic, use the following criteria:

- Criteria 1: Does it tell a story?
- Criteria 2: Does it use good/useful data/information?
- Criteria 3: Does the visual style help/hinder understanding the story?

3. University of Guelph 2022, *Infographics*, viewed 11 May 2022, <<https://libguides.library.curtin.edu.au/23things/visual-communication>>

Exercises

The infographic should focus on creating efficient, precise, and clear visuals that support the instructional goals of the message and eliminating details that serve as distractions from the primary goals of the infographic.

[https://www.tandfonline.com/doi/full/10.1080/](https://www.tandfonline.com/doi/full/10.1080/1051144X.2016.1205832)

[1051144X.2016.1205832](https://www.tandfonline.com/doi/full/10.1080/1051144X.2016.1205832)

Choose from the list below to insert a point of information and place your visual into the Dropbox “Draft Infographic” – below the infographic describe the message that you are conveying

Flow – flow chart

Process – Structure or hierarchical chart

Classification – Cluster

Relationships – Venn Diagram

Realistic Concepts – bar chart

About the Author



Aila Khan

WESTERN SYDNEY UNIVERSITY

Chapter 10 : Substantial Revisions

ANNA CAPPUCCITTI

Before you begin your editing process with a bird's-eye view of the whole document, it might be a good idea to step away from it altogether. Distancing yourself from the work you just drafted helps you approach it again with fresh eyes. This requires effective time management so that you have a solid draft ready well ahead of a deadline. Leaving enough time to shift attention to other work projects or your personal life, however, helps you forget a little what you were doing with the document in question. After some time, return to the document pretending it was written by someone else and you are its target audience. Ask yourself: will that target reader understand what you've written in the order you've presented it? To complete their understanding of your topic, what do they need to see that isn't in your draft yet? What parts are redundant, confuse the reader, or otherwise get in the way of their understanding and can just be deleted?

Alienating yourself from your own work helps give you the critical distance necessary to be more ruthless towards

it than you are at the drafting stage. You cling too personally to the words you come up with at the drafting stage, whereas you would be more critical of the same words if they were written by someone else. Creating that critical distance helps you:

- 1. Re-arrange the order that you originally plotted out at the outlining step if need be
- 2. Recognize gaps that must be filled with yet more draft material
- 3. Chop out parts that don't contribute to the purpose you set out to achieve

Evaluating Your Draft

When considering how your draft meets the objectives you set out to achieve at the outset, use a few different lenses to assess that achievement. Each lens corresponds to a step in the drafting process, as shown in the table below.

Table 15.1: Evaluation Lenses and Corresponding Steps in the Drafting Process

Evaluate for	Corresponding Step in the Drafting Process
1. Content	Laying down content in the researching stage
2. Organization	Organizing that material
3. Style	Stylizing it into effective sentences and paragraphs
4. Readability	Adding document design features

When reading with these lenses after taking a break from

your work, approach it more critically as if you were the reader you're catering to, not as the words' sentimental and protective parent.

When evaluating for content, consider what your audience needs to understand. Ask yourself if your coverage is thorough, or if you've left gaps that would confuse your target audience. Do any concepts need further explanation? Less? With constraints on the length and scope of your document in mind, consider if you got carried away with digressions that would send your reader down off-topic dead ends. Have you given your audience more than what they need so that your document would overwhelm them? More specifically, have you fact-checked all of your information to ensure that it is true and, if based on sources that must be documented, accurately cited and referenced?

When evaluating for organization, consider the flow of content to determine if the document leads the reader through to the intended understanding of the topic. Is it clear that you're taking the direct approach by getting right to the point when you need to do so, or is it obvious that you're taking the indirect approach as necessary? Would it be clear to your reader what organizing principle you've followed? When you outlined your draft in Step 3.2 of the writing process, you did so from a preliminary understanding of your topic. As you drafted your message, do you see that something you first thought made sense near the end of your draft makes more sense at the beginning?

When evaluating for style, again consider your audience's needs, expectations, and abilities. Did you draft in an informal style but now realize that a slightly more formal style is more appropriate or vice versa? Determine

if it meets audience expectations in terms of its clarity, conciseness, coherence, correctness, courtesy, and confidence. Now would also be a great time to assess whether your style is consistent or whether you started off formal but then lapsed into informality, or vice versa.

When evaluating for readability, consider your audience's needs in terms of the many features that frame and divide the text so that your reader doesn't get lost, confused, overwhelmed, repulsed, or bored. Check for whether you can do the following:

- Clarify titles
- Add headings or subheadings to break up large chunks of text
- Use lists to enable readers to skim over several items
- Add visuals to complement your written descriptions

The conclusions you draw from these evaluations will help inform and motivate you towards the substantial revisions explained below.

Reorganizing Your Draft

When you first move into a new apartment or house, you have a general idea of where all your furniture should go based on where it was in your previous place. After a few days, however, you may realize that the old arrangement doesn't make as much sense in the new layout. A new arrangement would be much more practical. The same is true of your document's organization once you've completed a working draft. You may realize that your

original outline plan doesn't flow as well as you thought it would now that you've learned more about the topic in the process of writing on it.

Moving pieces around is as easy as highlighting, copying (Ctrl c), cutting (Ctrl x), and pasting (Ctrl v) into new positions. When moving a whole paragraph or more, however, ensure coherence by rewriting the transitional element in the concluding sentence of the paragraph above the relocated paragraph so that it properly bridges to the newly located topic sentence below it. Likewise, the relocated paragraph's (or paragraphs') concluding sentence must transition properly to the new topic sentence below it. Additionally, any elements within the relocated text that assume knowledge of what came just before, such as abbreviations (e.g., CBC) that the reader hasn't seen fully spelled out yet must be fully spelled out here and can be abbreviated later in the text.

Adding to Your Draft

In furnishing your new apartment or house, especially if it's larger than what you had before, you'll find that merely transplanting your old furniture isn't enough. The new space now has gaps that need to be filled—a chair here, a couch there, perhaps a rug to tie the whole room together. Likewise, you'll find when writing a document that gaps need to be filled with more detail. Knowing your organizing principles well is helpful here. If you're explaining a procedure in a chronological sequence of steps, for instance, you may find that one of the steps you describe involves a whole other sequence of steps that you're sure your audience won't know. In this case, embedding the additional sequence using a sub-list

numbered with roman numerals (if you used Arabic numerals in the main list) completes the explanation. Of course, keep in mind any stated maximum word- or page-counts in case your document exceeds the acceptable range. If it does, then you must be ruthless about chopping anything unnecessary out of your draft.

Trimming Your Draft

As #2 in the 6 Cs of good writing, conciseness means using the fewest words possible to achieve the goal of communication, which is for your reader to understand your intended



meaning. Many college students who stretched out their words to reach 1000-word essays are relieved to find that college and professional audiences prefer writing that is as terse as a text. Indeed, because typing with thumbs is inefficient compared with 10 fingers on a keyboard and no one wants to read more than they must on a little screen, texting helps teach conciseness. Although professional writing requires a higher quality of writing than friends require of texts, the audience expectations are the same. The more succinct your writing is without compromising clarity, the more your reader will appreciate your writing. Given the choice between an article of 500 words and one of 250 that says the same thing, any reader would prefer the 250-word version.

The first trick to paring down your writing is to really want to make every word count and to see excess words

as indulgence. So, pretend that words are expensive. If you had to pay a cent of your own money for every character you wrote in a document that you had to print 1,000 copies of, you would surely adopt a frugal writing style. You would then see that adding unnecessary words is doubly wasteful. Time spent writing or reading tiresome information is time you and your reader could spend making money doing other things. Terse, to-the-point writing is both easier to write and easier to read. Follow the practical advice in the subsections below to trim your writing effectively.

1. Mass-delete Whatever Doesn't Belong

The first practical step towards trimming your document is a large-scale purge of whatever doesn't contribute to the purpose you set out to achieve. The order is important because you don't want to do any fine-tooth-comb proof-editing on anything that you're just going to delete anyway. This is probably the most difficult action to follow through on because it means deleting large swaths of writing that may have taken some time and effort to compose. If they sidetrack readers, whose understanding of the topic would be unaffected (at best) or (worst) overwhelmed by their inclusion, those sentences, paragraphs, and even whole sections simply must go. Perhaps save them in an "outtakes" document if you think you can use them elsewhere. Otherwise, like those who declutter their apartment after reading Marie Kondo's *The Life-Changing Magic of Tidying Up* (2014), the release that follows such a purge can feel something like enlightenment. Highlight, delete, and don't look back.

2. Delete Long Lead-ins

The next-biggest savings come from deleting lead-ins that you wrote to gear up towards your main point. In ordinary speech, we use lead-ins as something like throat-clearing exercises. In writing, however, these are useless at best because they state the obvious. At worst, lead-ins immediately upset the reader by signalling that the rest of the message will contain some time-wasting text. If you see the following crossed-out expressions or anything like them in your writing, just delete them:

- ~~I'm Jerry Mulligan and I'm writing this email to ask you to~~ please consider my application for a co-op position at your firm.
- ~~You may be interested to know that~~ you can now find the updated form in the company shared drive.
- ~~To conclude this memo,~~ we recommend a cautious approach to using emojis when texting clients, and only after they've done so first themselves.

In the first example, the recipient sees the name of the sender before even opening their email. It's therefore redundant for the sender to introduce themselves by name and say that they wrote this email. Likewise, in the third example, the reader can see that this is the conclusion if it's the last paragraph, especially if it comes below the heading "Conclusion." In each case, the sentence really begins after these lead-in expressions, and the reader misses nothing in their absence. Delete them.

3. Pare Down Unnecessarily Wordy

Phrases

We habitually sprinkle long stock phrases into everyday speech because they sound fancy merely because they're long and sometimes old-fashioned, as if length and long-time use grants respectability (it doesn't). These phrases look ridiculously cumbersome when seen next to their more concise equivalent words and phrases, as you can see in [Table 15.2](#) below. Unless you have good reason to do otherwise, always replace the former with the latter in your writing.

Table 15.2: Replace Unnecessarily Wordy Phrases with Concise Equivalents

Replace These Wordy Phrases	with These Concise Equivalents
due to the fact that	because
not later than July 7	by July 7
at this present moment in time	now
in any way, shape, or form	in any way
pursuant to your request	as requested
thanking you in advance	thank you
in addition to the above	also
in spite of the fact that	even though / although
in view of the fact that	because / since
are of the opinion that	believe that / think that
afford an opportunity	allow
despite the fact that	though
during the time that	while
on a weekly basis	weekly
at a later date/time	later
until such time as	until
in the near future	soon
fully cognizant of	aware of
in the event that	if
for the period of	for
attached hereto	attached
each and every	all
in as much as	because / since
more or less	about
feel free to	please

Again, the reader misses nothing if you use the words and phrases in the second column above instead of those in the first. Also, concise writing is more accessible to readers who are learning English as an additional language.

4. Delete Redundant Words

Like the wordy expressions in [Table 15.2](#) above, our speech is also riddled with redundant words tacked on unnecessarily in stock expressions. These prefabricated phrases strung mindlessly together aren't so bad when spoken because talk is cheap. In writing, however, which should be considered expensive, they make the author look like an irresponsible heavy spender. Be on the lookout for the expressions below so that you are in command of your language. Simply delete the crossed-out words in red if they appear in combination with those in blue:

- ~~absolutely~~ essential (you can't get any more essential than essential)
- ~~future~~ plans (are you going to make plans about the past? plans are always future)
- small ~~in size~~ (the context will determine that you mean small in size, quantity, etc.)
- refer ~~back~~ to
- ~~in order~~ to (only use "in order" if it helps distinguish an infinitive phrase, which begins with "to," from the preposition "to" appearing close to it)
- each ~~and every~~ or each ~~and~~ every (or just "all," as we saw in [Table 15.2](#) above)
- repeat ~~again~~ (is this déjà vu?)

5. Create a positive tone

A negative tone is unlikely to persuade readers and will not be well received.

Improving tone:

- Place yourself in the reader's position and focus on their perspective rather than your own.
 - Use positive language.
 - Be courteous.
-

Negative Tone

.....is facing severe economic hardships.

Layoffs appear to be imminent.

We cannot process your order because you failed to specify the model numbers.

Positive Tone

.....is facing financial difficulties.

We hope to avoid laying off workers.

Please specify the model numbers you require so we can process your order.

6. Delete Filler Expressions and Words

If you audio-record your conversations and make a transcript of just the words themselves, you'll find an abundance of filler words and expressions that you could

do without and your sentences would still mean the same thing. A few common ones that appear at the beginning of sentences are “There is,” “There are,” and “It is,” which must be followed by a relative clause starting with the relative pronoun *that* or *who*. Consider the following, for example:

1. There are many who want to take your place.	Many want to take your place.
2. There is nothing you can do about it.	You can do nothing about it.
3. It is the software that keeps making the error.	The software keeps erring.

In the first and third cases, you can simply delete “There are” and “It is,” as well as the relative pronouns “who” and “that” respectively, leaving the sentence perfectly fine without them. In the second case, deleting “There is” requires slightly reorganizing the word order, but otherwise requires no additional words to say the very same thing. In each case, you save two or three words that simply don’t need to be there.

Other common filler words include the articles *a*, *an*, and *the*, especially in combination with the preposition *of*. You can eliminate many instances of *of the* simply by deleting them and flipping the order of the nouns on either side of them.

technology of the future	future technology
-------------------------------------	-------------------

Obviously, you can’t do this in all cases (e.g., changing “first of the month” to “month first” makes no sense).

When proofreading, however, just be on the lookout for instances where you *can*.

The definite article the preceding plural nouns is also an easy target. Try deleting the article to see if the sentence still makes sense without it.

The shareholders unanimously supported the initiative.

Shareholders unanimously supported the initiative.

Though the above excess words seem insignificant on their own, they bulk up the total word count unnecessarily when used in combination throughout a large document.

Basically, you can't really do much to fully eliminate bad ideas because they're quite common.

You can't do much to eliminate bad ideas because they're so common.

7. Favour Short, Plain Words and Revise jargon or bureaucratic expressions

If you pretend that every character in each word you write costs money from your own pocket, you would do what readers prefer: use shorter words. The beauty of plain words is that they are more understandable and draw less attention to themselves than big, fancy words while still getting the point across. This is especially true when your audience includes ESL readers. Choosing shorter words is easy because they are often the first that come to mind, so writing in plain language saves you time. It also involves vigilance in opting for shorter words if longer jargon words come to mind first.

Obviously, you would use **jargon** for precision when

appropriate for your audience's needs and your own. You would use the word "photosynthesis," for instance, if (1) you needed to refer to the process by which plants convert solar energy into sugars, and (2) you know your audience knows what the word means. In this case, using the jargon achieves a net savings in the number of characters because it's the most precise term for a process that otherwise needs several words. Using jargon merely to extend the number of characters, however, is a desperate-looking move that your instructors and professional audiences will see through as a time-wasting smokescreen for a lack of quality ideas.

For business writing, simplifying language is more effective. Table 15.3 shows examples of commonly used complicated or bureaucratic expressions and their simpler alternative.

Table 15.3: Plain and Simple Language

Complicated or Bureaucratic Expression	Simpler Alternative
in lieu of	instead of
whereas	because
solicit	ask for
apparent	clear
as per your request	as you requested
commence	begin, start
consolidate	combine
ascertain	find out
demonstrate	show
disseminate	distribute, send
endeavour	try
erroneous	wrong
expedite	speed up
facilitate	help
implement	carry out
inception	start
leverage	use
optimize	perfect
terminate	end
proximity	near
finalize	about
subsequent	complete
utilize	use

Source: [Brockway \(2015\)](#)

The longer words in the above table tend to come from

the Greek and Latin side of the English language's parentage; whereas, the shorter words come from the Anglo-Saxon (Germanic) side. When toddlers begin speaking English, they use Anglo-Saxon-derived words because they're easier to master, and therefore recognize them as plain, simple words throughout their adult lives.

Definitely don't use longer words when they're grammatically incorrect. For instance, using **reflexive pronouns** such as "myself" just because it sounds fancy instead looks foolish when the subject pronoun "I" or object pronoun "me" are correct.

Aaron and **myself** will do the heavy lifting on this project.

Aaron and I will do the heavy lifting on this project.

I'm grateful that you contacted **myself** for this opportunity.

I'm grateful that you contacted **me** for this opportunity.

The same goes for misusing the other reflexive pronouns "yourself" instead of "you," "himself" or "herself" instead of "him" or "her," etc.

Sometimes, you see short words rarely used in conversation being used in writing to appear fancy, but just look pretentious, such as "said" preceding a noun.

Call me if you are confused by anything in the ~~said~~ contract.

Call me if you are confused by anything in the contract.

Usually, the context helps determine that the noun following "said" is the one mentioned earlier, making "said" an unnecessary, pompous add-on. Delete it or use the demonstrative pronouns "this" or "that" if necessary to avoid confusion.

Finally, don't fall into the trap of thinking that a simple

style is the same as being simplistic. Good writing can communicate complex ideas in simple words just like bad writing can communicate simple ideas with overly complex words. The job of the writer in professional situations is to make smart things sound simple. Be wary of writing that makes simple things sound complex. You probably don't want what it's selling.

8. Simplify Verbs

Yet another way that people overcomplicate their writing involves expressing the action in as many words as possible, such as by using the passive voice, continuous tenses, and nominalizations. We've already seen how the **passive voice** rearranges the standard subject-verb-object word. Consider the following sentences, for instance:

The candidate cannot **be supported by** our membership.

Our members cannot **support** the candidate.

Here, the active-voice construction on the right uses two fewer words to say the same thing. There are legitimate uses of the passive voice, however, overusing the passive voice sounds unnatural and appears as an attempt to extend the word count or sound more fancy and objective. Because the passive voice is either more wordy or vague than the active voice, however, readers prefer the latter most of the time and so should you.

Yet another strategy for extending the wordcount with verbs is to turn the main action they describe into nouns, a process called **nominalization**. This involves taking a verb and adding a suffix such as *-ant*, *-ent*, *-ion*, *-tion*, *-sion*, *-ence*, *-ance*, or *-ing*, as well as adding forms of other verbs, such

as to make or to give. Nominalization may also require determiners such as articles (*the*, *a*, or *an*) before the action nouns. Consider the following comparisons of nominalized-verb sentences with simplified verb forms:

The committee had a <u>discussion</u> about the new budget constraints.	The committee <u>discussed</u> the new budget constraints.
We will make a <u>recommendation</u> to proceed with the investment option.	We will <u>recommend</u> proceeding with the investment option.
They handed down a <u>judgment</u> that the offer wasn't worth their time.	They <u>judged</u> that the offer wasn't worth their time.
The regulator will <u>grant approval</u> of the new process within the week.	The regulator will <u>approve</u> the new process within the week.
He always gives me <u>advice</u> on what to say to the media.	He always <u>advises</u> me on what to say to the media.
She's <u>giving</u> your application a <u>pass</u> because of all the errors in it.	She's <u>passing</u> on your application because of all the errors in it.

You can tell that the above sentences have greater impact than those that turn the action into a noun and thus require more words to say the same thing. Indeed, each of the verb-complicating, wordcount-extending strategies throughout this subsection is bad enough on its own. In combination, however, writing riddled with nominalization, continuous verb forms, and passive-voice verb constructions muddies writing with an insufferable multitude of unnecessary words.

The final trick to making your writing more concise is the Editor feature in your word processor. In Microsoft Word, for instance, you can set up the Spelling & Grammar checker to scan for all the problems above by following the procedure below:

The committee had a <u>discussion</u> about the new budget constraints.	The committee <u>discussed</u> the new budget constraints.
We will make a <u>recommendation</u> to proceed with the investment option.	We will <u>recommend</u> proceeding with the investment option.
They handed down a <u>judgment</u> that the offer wasn't worth their time.	They <u>judged</u> that the offer wasn't worth their time.
The regulator will <u>grant approval</u> of the new process within the week.	The regulator will <u>approve</u> the new process within the week.
He always <u>gives me advice</u> on what to say to the media.	He always <u>advises</u> me on what to say to the media.
She's <u>giving</u> your application a <u>pass</u> because of all the errors in it.	She's <u>passing</u> on your application because of all the errors in it.

You can tell that the above sentences where the simple verb drives the action are punchier and have greater impact than those that turn the action into a noun and thus require more words to say the same thing. Indeed, each of the verb-complicating, word count-extending strategies throughout this subsection is bad enough on its own. In combination, however, writing riddled with continuous verb forms, and passive-voice verb constructions muddies writing with an insufferable multitude of unnecessary words.

The final trick to making your writing more concise is the Editor feature in your word processor. In Microsoft Word, for instance, you can set up the Spelling & Grammar checker to scan for all the problems above by following the procedure below:

1. Go to File (alt. + f) and, in the **File** menu, click on **Options** (at the bottom; alt. + t) to open the Word Options control panel.

2. Click on **Proofing** in the Word Options control panel.
3. Check all the boxes in the “When correcting spelling and grammar in Word” section of the Word Options control panel.
4. Click on the **Settings...** button beside “Writing Style” under the check boxes to open the Grammar Settings control panel.
5. Click on all the check boxes in the Grammar Settings control panel, as well as the Okay button of both this panel and the Word Options panel to activate.

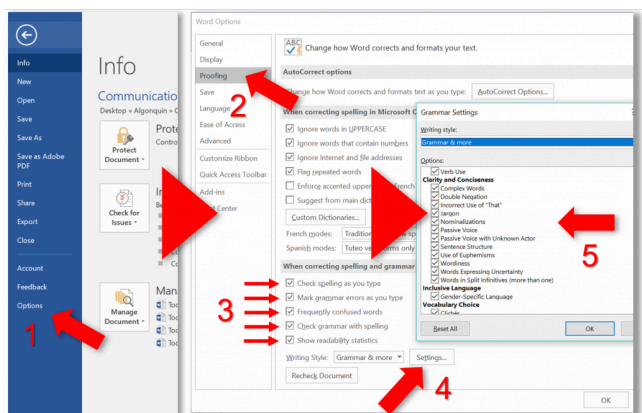


Figure 15.1: Setting up your MS Word Grammar, Style, and Spellchecker

6. Go to the **Review** menu tab in the tool ribbon at the top of the Word screen and select **Spelling & Grammar** (alt. + r, s) to activate the Editor that will, besides checking for spelling and grammar errors, also check for all of the stylistic errors you checked boxes for in the Grammar Settings control panel.
7. Go back and proofread the text to ensure

accuracy.

When you finish running your grammar, style, and spellchecker through your document, a dialog box will appear showing readability statistics. Pay close attention to stats such as the average number of words per sentence and letters per word. If the former exceeds thirty and the latter ten, your writing might pose significant challenges to some readers, especially ESL. Do them a solid favor by breaking up your sentences and simplifying your word choices.

Rather than complicate a message by adding useless verbiage, make your writing like a paperclip. A paperclip is beautiful in its elegance. It's so simple in its construction and yet does its job of holding paper together perfectly without any extra parts or mechanisms like staples need to fasten pages together and unfasten them. A paperclip does it with just a couple inches of thin, machine-bent wire. We should all aspire to make our language as elegant as a paperclip so that we can live life free of time-wasting writing.

Key Takeaway

Begin editing any document by evaluating it for the quality of its content, organization, style, and readability, then add to it, reorganize, and trim it as necessary to meet the needs of the target audience.

Exercises

Emphasizing the positive

1. We don't make refunds on returned merchandise that is soiled.
2. Because we are temporarily out of Baby Cry dolls, we won't be able to ship your order for 10 days.

Replace the unflattering term in *italics*.

3. Jim Riley is too (*incompetent*) for that kind of promotion.

Courteous Communication

4. You neglected to sign the enclosed document.

Selecting Words

Replace vague phrases that are underlined. Make up details that you might need.

5. We will be opening our new facility sometime this spring.
6. You can now purchase our new leaf blower at a substantial savings.

In the following sentences, replace long, complicated words.

7. Management (inaugurated) the recycling policy six months ago.
8. You can convey the same meaning without (utilizing) the same words.
9. I have to wait until payday to (ascertain) whether I got the raise.

Rewrite the following sentences, replacing obsolete phrases with up to date versions.

10. Even though it will increase the price of the fence, we have decided to use the redwood in lieu of the cedar.

References

Brockway, L. H. (2015, November 3). 24 complex words—and their simpler alternatives. *Ragan's PR Daily*. Retrieved from https://www.prdaily.com/Main/Articles/24_complex_wordsandtheir_simpler_alternatives_8750.aspx

Porter, R. (2015, July 30). Box hedge topiary shears gardener 869073. Retrieved from <https://pixabay.com/en/box-hedge-topiary-shears-gardener-869073/>

The Hustle. (2017, December 3). The Life-Changing Magic of Tidying Up. Retrieved from <https://thehustle.co/life-changing-magic-tidying/>

About the Author

Anna Cappuccitti

PART IV

EXTRA CHAPTERS

The three chapters below are extra chapters in which you can view if you want more information about research. These chapters are not mandatory for the FITS 204 class.

Extra reading -1 : Using Source Text: Quoting, Paraphrasing, and Summarizing

ANNA CAPPUCITTI

Learning Objective

1. Paraphrase, summarize, and reformat information collected from written materials.

Once you have a collection of credible sources as part of a formal secondary research project such as a report, your next step is to build that report around those sources, using them as anchors of evidence around your own arguments. If you began with an hypothesis and you're using the sources as evidence to support it, or if you realize that your hypothesis is wrong because all the credible sources you've found identified mistakes in it, you should

at this point be able to draft a thesis. From there, you can arrange your sources in an order that follows a logical sequence such as general to specific or advantages versus disadvantages. We will examine organizational structures in the next chapter on drafting, but we are now going to focus on how to incorporate source material into usable evidence.

You essentially have four ways of using source material available to you, three of them involving text, and one media:

- **Quoting text:** copying the source's exact words and marking them off with quotation marks
- **Paraphrasing text:** representing the source's ideas in your own words (without quotation marks)
- **Summarizing text:** representing the source's main ideas in your own words (without quotation marks)
- **Reproducing media:** embedding pictures, videos, audio, graphic elements, etc. into your document

In each case, acknowledging your source with a citation at the point of use and following-up with a full citation in your reference list at the end of your document is essential to avoid a charge of plagiarism. Let's now look at each of these in turn

Quoting Sources

Quoting is the easiest way to use sources in a research document, but it also requires care in using it properly so that you don't accidentally plagiarize, misquote, or overquote. At its simplest, quoting takes source text

exactly as it is and puts quotation marks (“ ”) around that text to set it off from your own words. The following points represent conventions and best practices when quoting:

- **Use double quotation marks:** In North America, we set off quoted words from our own words with double quotation marks (“ ”).
 - Also use double quotation marks for putting a single word or two in “scare quotes” when you’re drawing attention to how people use certain words and phrases—again, not single quotation marks.
 - Use **single quotation marks** only for reported speech when you have a quotation within a quotation, as in, “The minister responded to say, ‘No comment at this time’ regarding the allegations of wrongdoing.”
 - If no parenthetical citation follows immediately after the closing quotation marks, the sentence-ending period falls to the *left* of those closing quotation marks. A common mistake is to place the period to the right of the closing quotation marks (. . . wrongdoing”).
- **Use a signal phrase to integrate a quotation:** Frame a quotation with a “signal phrase” that identifies the source author or speaker by name and/or role along with a verb relating how the quotation was delivered. The signal phrase can precede, follow, or even split the quotation, and

you can choose from a variety of available signal phrase expressions suitable for your purposes ([Hacker, 2006, p. 603](#)):

- According to researchers Tblisky and Darion (2003), “..”
- As Vice President of Operations Rhonda Rendell has noted, “..”
- John Rucker, the first responder who pulled Mr. Warren from the wreckage, said that “..”
- Spokespersons Gloria and Tom Grady clarified the new regulations: “..”
- “...,” confirmed the minister responsible for the initiative.
- “...,” writes Eva Hess, “..”
- **Quote purposefully:** Quote only when the original wording is important. When we quote famous thinkers like Albert Einstein or Marshall McLuhan, we use their exact words because no one could say it better or more interestingly than they did. Also quote when you want your audience to see wording *exactly* as it appeared in the source text or as it was said in speech so that they can be sure that you’re not distorting the words as you might if you paraphrased instead. But if there’s nothing special about the original wording, then you’re better to paraphrase properly than to quote and to source that paraphrase.
- **Block-quote sparingly if at all:** In rare circumstances, you may want to quote a few sentences or even a paragraph at length if it’s important to represent every single word. If so,

the convention is to tab the passage in on both the left and right, not use quotation marks, set up the quotation with a signal phrase or sentence ending with a colon, and place the in-text citation following the final period of the block quotation. Consider the following example:

- Students frequently overuse direct quotation [when] taking notes, and as a result they overuse quotations in the final [research] paper. Probably only about 10% of your final manuscript should appear as directly quoted matter. Therefore, you should strive to limit the amount of exact transcribing of source materials while taking notes. (Lester, 1976, pp. 46-47)
- **Don't overquote:** As the above source says, a good rule of thumb is that your completed document should contain no more than 10% quoted material. Much above that will look lazy because it appears that you're getting quotations to write your document for you. Quote no more than a sentence or two at a time if you quote at all.
- **Quote accurately:** Don't misquote by editing the source text on purpose or fouling up a transcription accidentally. Quotation requires the *exact* transcription of the source text, which means writing the same words in the same order in your document as you found them in the original.
 - To avoid introducing spelling mistakes or other transcription errors, the best practice (if your source is electronic) is to highlight the text you want to quote,

copy it (ctrl. + c), and paste it (ctrl. + v) into your document so that it matches the formatting of the rest of your document (i.e., with the same font type, size, etc.). To match the formatting, use the Paste Options drop-down menu that appears beside pasted text as soon as you drop it in.

- **Use brackets and ellipses to indicate edits to quotations:** If you need to edit a quotation to be grammatically consistent with your own sentences framing the quotation (e.g., so that the tense is consistently past-tense if it is present-tense in the source text), add clarifying words, or delete words, do so using brackets for changed words and ellipses for deleted words as you can see in the Lester block quotation above.
 - Though many people mistakenly refer to parentheses () as “brackets”, brackets are squared [] and are used mainly to indicate changes to quoted words, whereas parentheses follow the quotation and mark off the citation. If you were to clarify and streamline the final sentence of the block quotation a few points above, for instance, you could say something like: Lester (1976) recommended “limit[ing] the amount of exact transcribing . . . while taking notes” (p. 47). Here, the verb “limit” in the source text needs to be converted into its participle form (having an *-ing* ending) to follow the past-tense verb in the sentence

framing the quotation grammatically. Sneakily adding the “ing” to “limit” without using brackets would be *misquotation* because “limiting” appears nowhere in the original.

- Notice that the ellipsis above is three *spaced* periods (not three stuck together, as in “...”).
- Be careful not to use brackets and ellipses in a way that distorts or obscures the meaning of the original text. For instance, omitting “Probably” and changing “should” to “[can]” in the Lester quotation above will turn his soft guideline into a hard rule, which are not the same.
- If the quotation includes writing errors such as spelling mistakes, show that they’re the author’s (rather than yours) by adding “[sic]” immediately after each error (“*sic*” abbreviates *sic erat scriptum*, Latin for “thus it had been written”), as in: When you said in the class discussion forum, “No one cares about grammer, [sic] it doesnt [sic] really matter,” you tend to undermine your credibility on the topic with poor spelling and a comma splice.
- Capitalize as in the original, even if it seems strange to start a quotation with a capital (because it was the first word in the original) though it’s no longer the first word because it follows a signal

phrase in your sentence. See the example in the point above, for instance.

References

Hacker, Diana. (2006). *The Bedford handbook* (7th ed.). New York: St. Martin's. Retrieved from https://department.monm.edu/english/mew/signal_phrases.htm

Lester, J. D. (1976). *Writing research papers: A complete guide* (2nd ed.). Glenview, Illinois: Scott, Foresman.

Paraphrasing Sources

Paraphrasing or “indirect quotation” is putting source text in your own words and altering the sentence structure to avoid using the quotation marks required in direct quotation. Paraphrasing is the preferred way of using a source when the original wording isn’t important. This way, you can incorporate the source’s ideas so they’re stylistically consistent with the rest of your document and thus better tailored to the needs of your audience. Also, paraphrasing a source into your own words proves your advanced understanding of the source text.

A paraphrase must faithfully represent the source text by containing the same ideas as in the original in about the same length. As a matter of good writing, however, you should try to streamline your paraphrase so that it tallies fewer words than the source passage while still preserving the original meaning. An accurate paraphrase of the

Lester (1976) passage block-quoted in the section above, for instance, can reduce a five-line passage to three lines without losing or distorting any of the original points:

Lester (1976) advises against exceeding 10% quotation in your written work. Since students writing research reports often quote excessively because of copy-cut-and-paste note-taking, try to minimize using sources word for word (pp. 46-47).

Notice that using a few isolated words from the original (“research,” “students,” “10%”) is fine, but also that this paraphrase doesn’t repeat any two-word sequence from the original because it changes the sentence structure along with most of the words. Properly paraphrasing without distorting, slanting, adding to, or deleting ideas from the source passage takes skill. The stylistic versatility required to paraphrase can be especially challenging to EAL learners and native English users whose general writing skills are still developing.

A common mistake that students make when paraphrasing is to go only part way towards paraphrasing by substituting major words (nouns, verbs, and adjectives) here and there while leaving the source passage’s basic sentence structure intact. This inevitably leaves strings of words from the original untouched in the “paraphrased” version, which can be dangerous because including such direct quotation without quotation marks will be caught by the plagiarism-busting software that college instructors use these days. Consider, for instance, the following botched attempt at a paraphrase of the Lester (1976) passage that substitutes words selectively (lazily):

Students often overuse quotations when taking notes,

and thus overuse them in research reports. About 10% of your final paper should be direct quotation. You should thus attempt to reduce the exact copying of source materials while note taking (pp. 46-47).

Let's look at the same attempt, but colour the unchanged words red to see how unsuccessful the paraphraser was in rephrasing the original in their own words (given in black):

Students often overuse quotations when taking notes, and thus overuse them in research reports. About 10% of your final paper should be direct quotation. You should thus attempt to reduce the exact copying of source materials while note taking (pp. 46-47).

As you can see, several strings of words from the original are left untouched because the writer didn't change the sentence structure of the original. The Originality Report from plagiarism-catching software such as Turnitin would indicate that the passage is 64% plagiarized because it retains 25 of the original words (out of 39 in this "paraphrase") but without quotation marks around them. Correcting this by simply adding quotation marks around passages like "when taking notes, and" would be unacceptable because those words aren't important enough on their own to warrant direct quotation. The fix would just be to paraphrase more thoroughly by altering the words *and* the sentence structure, as shown in the paraphrase a few paragraphs above. But how do you go about doing this?

Paraphrase easily by breaking down the task into these seven steps:

1. Read and re-read the source-text passage so that you thoroughly understand each point it makes. If it's a long passage, you might want to break it up into digestible chunks. If you're unsure of the meaning of any of the words, look them up in a dictionary; you can even just type the word into the Google search bar, hit *Enter*, and a definition will appear, along with results of other online dictionary pages that define the same word.
2. Look away and get your mind off the target passage.
3. Without looking back at the source text, repeat its main points as you understood them—not from memorizing the exact words, but as you would explain the same ideas in different words out loud to a friend.
4. Still without looking back at the source text, jot down that spoken wording and tailor the language so that it's stylistically appropriate for your audience; edit and proofread your written version to make it grammatically correct in a way that perhaps your spoken-word version wasn't.
5. Now compare your written paraphrase version to the original to ensure that:
 - You've accurately represented the meaning of the original without:
 - Deleting any of the original points
 - Adding any points of your own
 - Distorting any of the ideas so they mean something substantially different from those in the original, or even take on a different character because you use

words that, say, put a positive spin on something neutral or negative in the original

- You haven't repeated any two identical words from the original in a row
6. If any two words from the original remain, go further in changing those expressions by using a thesaurus in combination with a dictionary. When you enter a word into a thesaurus, it gives you a list of synonyms, which are different words that mean the same thing as the word you enter into it.
- Be careful, however; many of those words will mean the same thing as the word you enter into the thesaurus in certain contexts but not in others, especially if you enter a homonym, which is a word that has different meanings in different parts of speech.
 - For instance, the noun *party* can mean a group that is involved in something serious (e.g., a third-party software company in a data-collection process), but the verb *party* means something you do on a wild Saturday night out with friends; it can also function as an adjective related to the verb (e.g., *party trick*, meaning a trick performed at a party).
 - Whenever you see synonymous words listed in a thesaurus and they look like something you want to use but you don't know what they mean

exactly, always look them up to ensure that they mean what you hope they mean; if not, move on to the next synonym until you find one that captures the meaning you intend. Doing this can save your reader the confusion and you the embarrassment of obvious thesaurus-driven diction problems (poor word choices).

7. Cite your source. Just because you didn't put quotation marks around the words doesn't mean that you don't have to cite your source.

Summarizing Sources

Summarizing is one of the most important skills in communications because professionals of every kind must explain to non-expert customers, managers, and even co-workers the complex concepts on which they are experts, but in a way that those non-experts can understand. Adapting the message to such audiences requires brevity but also translating jargon-heavy technical details into plain, accessible language.

Summarizing is thus paraphrasing only the highlights of a source text or speech. Like paraphrasing, a summary is indirect quotation that re-casts the source in your own words; unlike a paraphrase, however, a summary is a fraction of the source length—anywhere from less than 1% to a quarter depending on the source length and length of the summary. A summary can reduce a whole novel or film to a single-sentence blurb, for instance, or it could reduce a 50-word paragraph to a 15-word sentence. It can be as casual as a spoken overview of a meeting your colleague was absent from, or an elevator pitch selling a project idea

to a manager. It can also be as formal as a memo report to your colleagues on a conference you attended on behalf of your organization.

The procedure for summarizing is much like that of paraphrasing except that it involves the extra step of pulling out highlights from the source. Altogether, this can be done in six steps, one of which includes the seven steps of paraphrasing, making this a twelve-step procedure:

1. Determine how big your summary should be (according to your audience's needs) so that you have a sense of how much material you should collect from the source.
2. Read and re-read the source text so that you thoroughly understand it.
3. Pull out the main points, which usually come first at any level of direct-approach organization (i.e., the prologue or introduction at the beginning of a book, the abstract at the beginning of an article, or the topic sentence at the beginning of a paragraph);
 - Disregard detail such as supporting evidence and examples.
 - If you have an electronic copy of the source, copy and paste the main points into your notes; for a print source that you can mark up, use a highlighter then transcribe those main points into your electronic notes.
 - How many points you collect depends on how big your summary should be

(according to audience needs).

4. Paraphrase those main points following the seven-step procedure for paraphrasing outlined above.
5. Edit your draft to make it coherent, clear, and especially concise.
6. Ensure that your summary meets the needs of your audience and that your source is cited. Again, not having quotation marks around words doesn't mean that you are off the hook for documenting your source(s).

Once you have a stable of summarized, paraphrased, and quoted passages from research sources, building your document around them requires good organizational skills. We'll focus more on this next step of the drafting process in the following chapter, but basically it involves arranging your integrated research material in a coherent fashion, with main points up front and supporting points below proceeding in a logical sequence towards a convincing conclusion. Throughout this chapter, however, we've frequently encountered the requirement to document sources by citing and referencing, as in the last steps of both summarizing and paraphrasing indicated above. After reinforcing our quoting, paraphrasing, and summarizing skills, we can turn our focus on how to document sources.

Key Takeaway

Including research in your work typically involves properly

CHARLETTE

paraphrasing, and/or summarizing source text, as well as citing it.

About the Author

Anna Cappuccitti

7.

Extra Reading 2 – Communicating Insights or Presenting Research Results

AILA KHAN

Learning Objectives

By the end of this chapter, students must be able to:

- be familiar with the different ways of presenting research results
- be able to apply different graphs to present results

This chapter is derived from the [Australian Bureau of](#)

[Statistics](#) ¹; licensed under a [Creative Commons Attribution 4.0 International licence](#).

Presenting the results in a clear and logical format to the client is one of the most important tasks for the person managing the survey. When presenting results, the format of the presentation should be tailored to address the aims and objectives of the survey and to satisfy the potential users of the results. Consideration should be given to the level of statistical understanding of the clients and users, particularly in regard to statistical terminology. The presentation needs to be effective, easy to understand and convey the main features of the data.

Written Reports

When presenting the data, some form of a written report is essential. The report should convey the main features clearly and follow a logical progression, use as little jargon as possible, provide insight into the data and make the results as interesting as possible. As the author of the report, you should convey specific messages rather than generalised information. You should also put forward theories to explain the findings and encourage the users to further explore the data. If appropriate, you may need to include recommendations.

The contents of the report and its balance of words, tables and graphs will naturally depend on the topic, the results and the likely readers. Graphs and tables convey

1. Australian Bureau of Statistics n.d., *Presentation of results*, viewed 31 March 2022, <<https://www.abs.gov.au/websitedbs/d3310114.nsf/home/Basic+Survey+Design+-+Presentation+of+Results>>.

complex information clearly and can be used to add variety. At all times it should be remembered that the report is written to be read, and so needs to make sense and be understandable.

A survey report generally covers:

Introduction

The introduction states the purpose and aims of the survey and the aims of the report; gives the background to the research; defines terms and concepts; and states whether the survey is testing an hypothesis or is exploratory.

Methodology

The methodology describes the method of sampling and information on the survey population, as well as how the data was analysed and the statistical procedures which were used.

Findings and Analysis

The findings and analysis section is the main part of the report which deals with details of the sample numbers, response rates, results and interpretation of tabulations etc. and discusses possible courses of action.

Conclusions and Recommendations

The conclusions summarise the major findings of the report and answers questions posed in the introduction.

The recommendations outline what actions are indicated on the basis of the conclusions.

Appendices and References

The appendices consist of items which may be useful to the reader (e.g. the questionnaire) but not essential to the report. References list the books, journals and papers referred to in the study.

Remembering that the report is likely to serve as a basis for discussion, some other important considerations are the title, use of headings and sub-headings, the colour and design of the cover and the overall appearance of the report – it should stimulate the reader's interest.

Statistical Representation

The manner in which the results are presented will depend on the data and the types of descriptive statistics required. Tables and graphs are the most common form of presentation but other types are available. In general, tables are more detailed – showing the actual values, whereas graphs are more useful in showing relationships – concentrating on the form, shape and movement of the data. Graphs are particularly useful in representing the change in the value of a data item over a period of time. Usually, either a graph or a table will be sufficient to represent a set of data.

Tables

Tables are the most common form of statistical

presentation. Tables present additional information which cannot be shown in general text. A good table is one in which patterns and exceptions stand out when looking at the table, followed by a small paragraph commenting on the table. Tables are usually only used to present a few values as they become difficult to comprehend if they involve too many numbers.

Tables should have clear headings. Some other useful guidelines are:

- to round data to 4 or 5 significant figures which makes the data easier to see and manipulate;
- reading down is easier than reading across a row, especially for a large number of items;
- row and column averages or percentages may help the reader interpret the data – widely spaced columns are difficult to compare and should be avoided, and
- totalling rows and/or columns is usually helpful

Graphs

We can also use a sequence of simple graphs to tell a story about the data and to give insight into findings. This can be supported by an explanatory paragraph.

Graphs are a visually attractive way of presenting data. They maintain the interest of the readers and encourage them to think about the data. Although the amount of information which can be presented is limited, graphs often reveal or highlight “hidden” facts in complex data. Trends and relationships are more clearly grasped from a graph rather than a table or text and are therefore better remembered by the reader. However, graphs are not

always necessary and should only be used where it is appropriate. Keep in mind that the reader may not be familiar with the data and therefore you need to include sufficient information on the graph to explain the data.

Constructing Graphs

- **Titles:** A title is essential and is best placed at the top. It should indicate the “what, where and when” of the graph as concisely as possible and should be larger than the lettering on the graph itself
- **Scales:** the horizontal scale usually measures the time unit where a graph is over a period of time, and the vertical scale measures the variable under consideration. Where possible the vertical scale should begin at zero
- shading and colouring can be added to create visual emphasis;
- both axes should be marked and named with scales and units;
- all parameters and variables should be defined as concisely as possible;
- a legend may be necessary, particularly for detailed graphs with shading and/or colouring;
- labels should be used if more than one variable is plotted on the same graph; and
- footnotes may be used to explain unusual features such as breaks in the series.

Types of Graphs

The decision as to which type of graph to use depends on the type of data being presented. The following are some of the types of graphs that could be used:

- Line or Curve Graphs

These graphs are used when emphasis on the movement rather than the size of the data item or when several series are being compared. These types of graphs show variations in the data plotted over a period of time.

- Bar or Column Graph

This type of graph depicts numerical values over a given variable. The value is represented by the height of the column. This type of graph is especially effective for showing large changes from one period to the next.

- Grouped Columns/Bars

These graphs compare different categories on the same graph. Groups of columns, with each column in the group representing a different category, are plotted on the same axis.

- Pie Chart

These charts are used for comparison (in percentage terms) of components. The components can be compared with each other and the contribution they make with the whole. These graphs are best used when there is a small number of categories.

- Map

A map is used to show the boundaries of areas. Various shadings for different regions can show how the value of variable changes between locations.

- Other Graphs

Some other graphs which are available include Index, Pictogram, Surface Chart, Cumulative Curve, Deviation Line, Sliding Bar Chart, Dot Chart, Population Pyramid, Map Chart, Stacked Bar and Scatter Diagram.

Other Forms of Presentation

Oral Presentations

Depending on the circumstances (users, type of data, results), a written report may be inadequate or may need to be supplemented. Oral presentation of the results of a survey is often neglected as an important means of conveying information. Whereas a written report provides great detail with a wide range of results, an oral session can only emphasise a few major points. However, this can often be most suitable depending on the audience. As with a written report, the poor presentation may cause the survey results to be rejected. The spoken word and visual aids can have a great impact on an audience. The presenter therefore should be aware of who the presentation is aimed at and know what survey results may be contrary to existing ideas.

Posters

A poster is one way to attract attention but only one direct statement should be made. The message must be noticeable at a glance and the poster itself must be attractive to encourage possible users to inspect it.

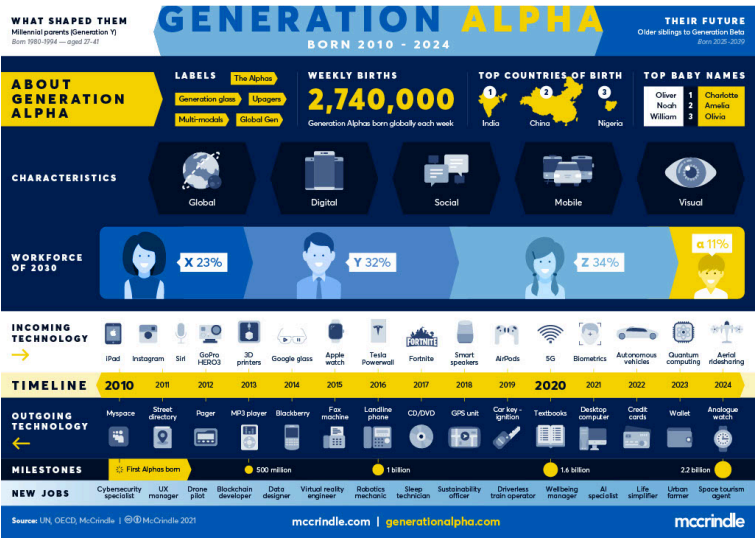
Panel Exhibits

A panel exhibit is an extension of the poster presentation. This type of presentation gives more details and expands several main ideas. Again it is important that the panels be colourful and attractive.

CHARLETTE

Charts (often referred to as an infographic)

A chart may be appropriate depending on the data. A chart is an outline map that can contain photographs, words, figures, graphs, diagrams, maps, symbols, illustrations, etc (eg. a weather chart).



The infographic [Generation Alpha](#) created by McCrindle 2021 is licensed under a [Creative Commons Attribution 4.0 International Licence](#) ²

Videos

The use of videos and television can provide an additional means of communication of the survey results.

2. McCrindle 2021, *Generation alpha*, viewed 28 February 2022, <<https://2qean3bjjd1s8781zool5ji-wpengine.netdna-ssl.com/wp-content/uploads/infographics/Generation-Alpha-Infographic-2021.pdf>>

Conclusion

It is important to present data well. If we have gone to the effort, time and expense of undertaking a study, then we have to ensure that we present the data in a clear, logical way. We must consider the use of text, tables and diagrams to construct a document that is useful and understandable. The ultimate aim of any presentation is to inform the user of the results of the research in a way that can be used to promote informed decision making.

About the Author



Aila Khan
WESTERN SYDNEY UNIVERSITY

8.

Extra Reading 3 – Primary Research

AILA KHAN

Learning Objectives

By the end of this chapter, students must be able to:

- Define primary research and identify the different methods for primary data collection
- Explain the pros and cons of different (primary) data collection methods
- Realize the advantages and disadvantages of primary research
- Understand the key differences between primary and secondary research

Primary Research

Primary data refers to information that is collected by the researcher specifically for the project at hand. This method is useful when simply relying on secondary data is not sufficient. Some research questions – such as, what do consumers think of our new brand of soft drink? – require first hand collection of primary data. While it can take time and resources to collect good, rigorous primary data, the benefit is that the data belongs to the researcher or his/her organization.

Given below are some of the key tools used to collect primary data. It should be noted that primary data can be both quantitative as well qualitative information.¹

Interviews

1. Qualtrics n.d., *Everything you need to know about primary research*, viewed 28 February 2022, <<https://www.qualtrics.com/au/experience-management/research/primary-research/?rid=ip&prevsite=en&newsite=au&geo=AU&geomatch=au>>.



Interview photo © 2022 Western Sydney University taken by [Sally Tsoutas Western Sydney University Photographer](#) is licensed under an [Attribution-NonCommercial-NoDerivatives 4.0 International](#)

Interviews involve one-on-one sessions, either on phone or in a face-to-face context between the researcher and the interview participant. As a result of COVID-19, a lot of interviews were moved online and were carried out on different meeting platforms such as Zoom. Interviews are great for exploring a topic more deeply. For example, a researcher may wish to understand people's motivations behind making a charitable donation to a particular organization. A one-on-one approach is far more effective in probing and understanding the reasons behind such an action. Interviews are also useful when one talks to experts. An expert in an area, such as a supply chain can provide useful insights into a problem. With their previous experience, such experts can be a useful addition to a researcher's list of interviewees. A drawback of

interviews is the time spent interviewing different people. It can also become expensive and tedious, especially if interviewees are geographically spread out.

Surveys

Surveys or questionnaires are structured tools to collect quantitative data. Surveys can be conducted either face to face (for example in a supermarket) or these can also be undertaken on phone. Many surveys are disseminated via email. In other cases, specific individuals (such as employees of an organization) will be invited to participate in a survey hosted on a specific website. Generally speaking, surveys will be completed by a large number of people so the results can be statistically significant. While surveys can be used to collect textual data, many people do not provide detailed information in writing. Thus, surveys should be used for closed-ended questions (e.g., *“do you own a car”*, *“when did you last purchase a fridge”* or *“on a scale of 1 to 5, where 1 is not at all likely and 5 is highly likely, what is the likelihood of you purchasing a new smartphone this year?”*). Surveys need to be well-designed so useful information can be collected. They are not flexible, so all relevant questions need to be inserted before the commencement of the research project.

Observations

Observational research requires no interaction between the researcher and the subject. Qualitative and quantitative information is collected on the basis of making a systematic observation and documenting it. While such an approach reduces the chance of

researcher's bias, it is also limited in not providing an explanation for actions undertaken by an individual. For instance, while a retail store manager – with the help of in-store cameras – can see how customers shop in the aisles but he or she may not be able to get an explanation for this behavior. Similarly, mystery shoppers who are disguised as shoppers and are used by supermarkets such as Coles to evaluate their own service also carry out observational research.

Focus groups

Focus groups are effective at generating a significant amount of information in a limited time. Focus groups are particularly useful when a discussion amongst participants may lead to new ideas or solutions. This primary research method requires the expertise of a good facilitator who can skillfully get all group members to participate. While these are a favourite with some practitioners, care needs to be taken while running a focus group. Some people may not participate at all or may respond in a particular way to fit in with the majority.

Smart Devices

A consumer in the year 2022 uses a range of smart devices such as a smartphone, wearable technologies, smart appliances such as fridges and televisions. Since these devices are connected to the internet, not only do they create data but also store, process and transmit this information. While there can be many ethical questions around what kind of data is being accessed by whom, the

fact is that this information can be useful to many businesses.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://opentextbooks.library.arizona.edu/fits204/?p=37#oembed-1>

Source: Tutor2u ²

Social media data: secondary or primary?

This is a point often discussed in the research community. Should data from social media be classified as secondary or primary? It depends on how data on social media is being retrieved. If a social media platform such as Twitter is being used to collect all those tweets with a hash tagged brand (e.g., #Nike) then it must be considered as primary data. This primary data is being collected – firsthand – by the researcher for a specific purpose. Some people may argue that the researcher did not actively seek tweets from account holders. Yet, such a dataset is primary in nature as no one else has compiled this information (with #Nike) for a specific research objective. However, if the same researcher makes use of a report on social media analytics or downloads a report posted on Twitter (e.g., an article

2. Tutor2u 2018, *Primary market research*, 18 May, online video, viewed 3 March 2022, <<https://www.youtube.com/watch?v=tJiJsiOs2I->>.

on the use of Twitter by 20-something-year-olds), such information may be classified as being ‘secondary’.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=37#h5p-6>

About the Author



Aila Khan
WESTERN SYDNEY UNIVERSITY

9.

Extra Reading 4 – Questionnaire Design

AILA KHAN

This chapter is derived from the Australian Bureau of Statistics ¹; licensed under a [Creative Commons Attribution 4.0 International licence](https://creativecommons.org/licenses/by/4.0/)

Learning Objectives

By the end of this chapter, students must be able to:

- Highlight the steps in the questionnaire design process
- Familiarise themselves with the principles of good questionnaire design

1. Australian Bureau of Statistics n.d., *Questionnaire design*, viewed 3 March 2022, <<https://www.abs.gov.au/websitedbs/D3310114.nsf/home/Basic+Survey+Design++Questionnaire+Design>>.

- Identify common issues in questionnaires

Questionnaire Design

The questionnaire can influence the response rate achieved in the survey, the quality of responses obtained, and consequently the conclusions drawn from the survey results. Questionnaire design should be started by considering the objectives of the survey and the required output, and then devising a list of questions to accurately obtain this information. Careful consideration should be given to a number of factors including the types of questions to be asked, the questionnaire wording, the structure and design of the questionnaire, and testing the questionnaire to ensure that quality data is collected. A poorly designed questionnaire can be the biggest source of non-sampling error (either directly or indirectly).

This section discusses the developmental phase of questionnaire design, question-wording, different types of questions, and the structure and design of the questionnaire. Testing the draft questionnaire will also be covered in this chapter.

Questionnaire Development

This section lists down the various steps involved in the development of a questionnaire. This development phase needs to ensure that the data items in the final questionnaire are appropriate and can be collected accurately. It is also important to consider early on, the

coding of questionnaire responses and the type of processing system to be used to process the questionnaire.

Step 1: Defining the Objectives with the Client

Before a questionnaire can be designed, time must first be spent clarifying the objectives of the survey with the client. It is important that the reasons for collecting the information are clearly articulated. Defining the objectives with the client includes:

- clarifying the objectives of the survey;
- justifying the collection in terms of the benefits;
- determining the scope of the survey, ie who is to be surveyed;
- determining the desired output, ie specify the tables according to the objectives and the precision required;
- preparing a list of content, ie information needed according to the objectives. A number of questions may be necessary to obtain the desired information;
- defining the content;
- justifying the content, ie is all the information collected necessary; and
- establishing priorities for each data item. This is important in ensuring that the most important data items are collected. It also makes it easier to discard less important questions if the survey budget is reduced.

Step 2: Researching the Topic

It is very important that the researcher who is going to design the questionnaire undertakes background research into the topic under consideration. In terms of questionnaire design, the research should aim to:

- clearly define the concepts and definitions to be used in the survey. The use of standard definitions and classifications will enhance data comparability; and
- accurately identify the target population characteristics. This needs to be done so that questions can be pitched at an appropriate level

It is also worthwhile looking at past surveys on the same topic to learn from past experience. Such collections can prove to be useful as it helps to avoid possible mistakes. It is important to look at the concepts, definitions, and question wording of past collections if a time series is to be created since changes in these will result in changes in responses. For example, a question in the 1981 Population Census, ‘Do you have a mortgage?’ received very different responses from those that were obtained in the 1986 Census when the question was changed to ‘Have you paid off your house?’ Many people who had second mortgages included this in the 1981 Census but not in the 1986 Census.

Step 3: Decide on Screening Questions (to select the respondents)

Screening questions (also known as “screeners”) are used

to either qualify or disqualify respondents from taking the survey—depending on how they answer. To make a comprehensive list of screening questions, researchers need to develop a clear set of inclusion and exclusion criteria. Inclusion criteria may be based on demographics (e.g., females, based in Sydney, between the ages 18-25 years, and enrolled in a Business degree), attitudes (such as prefers to purchase locally-grown produce), lifestyle (spending weekends on the beach), and/or behaviour (a regular purchaser of Nescafe coffee).

Example

Imagine you work for Nestle. You want feedback on a new blend of instant coffee. However, you only want to collect information from heavy users in Sydney. Your screening questionnaire could include questions such as:

- Where do you live? (NOTE: Stop survey if the response is anything other than Sydney)
- Do you enjoy instant coffee? (If No, – or not sure or not applicable – then do not proceed with questions)
- On average, how much instant coffee would you have in a day? (Anyone with less than 4 cups will be screened out)

Step 4: Finalising the Questions and Type of Scales

Deciding on the content of the questions and the scale used to measure them will have an impact on data analysis.

All question content should be linked to the original objectives decided in consultation with the client.

Open vs. Closed Questions

Questions can generally be classified as one of two types – open or closed – depending on the amount of information that can be provided. Open questions allow the respondents to answer the question in their own words. An example is ‘What is your occupation?’ The advantage of these types of questions is that they allow many possible answers and they can collect exact data from a variety of possible responses. However, they are more demanding than closed questions, both to answer and process. Open questions are often used in pilot tests to determine the range of likely responses.

Closed questions provide respondents with a range of the most likely answers to choose from. These questions are appropriate when the researcher can anticipate most of the responses and when exact values are not needed. However, they require more effort than open questions in the development and testing stages. The processing time of closed responses is much less than that of open-ended responses.

Table: Types of Closed Questions

Types of Closed Questions	Answer Format
Limited Choice	Yes/No
Multiple Choice	Choose from a number of responses
Checklist	Choose more than one of the responses from a given list
Partially Closed	Last alternative states 'Other, please specify'

The table below lists all the different types of questions that are used to collect different pieces of information from respondents.

**Table: Types of Questions for Different
Types of Information**

Types of Questions	Information Sought
Factual Questions	Factual information, e.g., Do you have a driver's license?
Opinion Questions	Respondent's personal opinion towards, for instance, soft drinks
Behavioural Questions	Respondent's actions or undertaking an activity, e.g., have you travelled overseas this year?
Hypothetical Questions	Respondent's answers to hypothetical situations, e.g., what would you do if....
Demographic Questions	Respondent's personal information, such as gender, age, profession, postcode; Used for creating respondent segments
Knowledge Questions	Used to check respondents' knowledge about certain issues, e.g., who is the current PM of Australia?

While the type of question relates to the information sought from the respondent, the way it is 'measured' (with appropriate scales) will make it feasible to carry out different types of statistical analyses. Given below is an example that demonstrates how the four scales can be used to measure the same concept.

Assume, a marketer is interested in measuring people's ice cream-related attitudes and purchase behaviours. Below are some of the ways in which questions/scales could be drafted:

A. "Have you purchased an ice cream product in the past few days?" Yes _ No _ (Nominal scale)

B. "Assume you are making a shopping list. Place the following products from 1 to 4, where 1 = top priority and 4 = least priority on the list" (Ordinal Scale)

Products: Coffee, Soft Drinks, Ice cream, Juice, Chocolate

1.

2.

3.

4.

C. "On a scale of 1 to 5, where 1 = Strongly Disagree and 5 = Strongly Agree, please rate your level of agreement to the following items:" (Interval Scale)

Strongly disagree

Strongly agree

I love ice cream

1 2 3 4 5

I feel happy when I have an ice cream

1 2 3 4 5

I will go out of my way to purchase my favourite ice cream

1 2 3 4 5

D. How much did you spend on ice cream last week? \$ _
(Ratio scale)

Step 5: Check Question-Wording and Response Categories

There are a number of factors to consider when designing questions to ensure that appropriate answers are obtained. Several aspects of question design can introduce error, namely:

Language

Questions that employ complex or technical language or jargon can confuse or irritate respondents. In the case of interviewer-based surveys, respondents who do not understand the question may be unwilling to appear ignorant by asking the interviewer to explain the questions. The respondent may then either refuse to answer or give an inaccurate response.

Technical language or jargon should only be used in cases where it is part of the normal language of the survey's target population. An example of this case would be a survey of information technology specialists: the survey would need to use language that is 'jargon' to the survey designer, but appropriate for the respondent.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=51#h5p-17>

A general principle to keep in mind is that the wording of questionnaire items should be specific, definitive, consistent, brief, simple, and self-explanatory.

Ambiguity

If ambiguous words or phrases are included in a question, the meaning may be interpreted differently by different people. This will introduce errors in the data since different respondents will be virtually answering different questions.

For example, consider the question ‘Has your standard of living decreased substantially because of a sharp increase in your monthly mortgage repayments?’ A ‘No’ answer could mean any one of a number of things – for instance: ‘No my standard of living has not dropped because of increased repayments’ or ‘No, my repayments have not increased’.

A question may also seem straightforward but allow for a variety of different kinds of answers. It is important to include the measurement unit you require wherever one applies, e.g. dollars, days, litres.



An interactive H₅P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=51#h5p-18>

Double-Barrelled Questions (Multiple

Concepts in one Question)

These are apparently single questions that actually incorporate two different questions. For example: ‘Do you intend to leave work and return to full-time study this year?’ A person may be intending to leave work, but not to return to study, and vice versa. When different parts of the question have different answers or parts of the question are not relevant, respondents may be unsure how to answer. When attempting to interpret answers to such questions, it can be unclear to which part of the question the answer corresponds.

Leading Questions

An error will be introduced if questions lead respondents towards a particular response. For example, the question ‘How many days did you work last week?’, if asked without first determining whether respondents did in fact work in the previous week, is a leading question. It implies that the person would have or should have been at work. Respondents may answer incorrectly to avoid telling the interviewer that they were not working.



An interactive H₅P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits2o4/?p=51#h5p-19>

Unbalanced Questions

Another form of leading questions is unbalanced questions. For example, ‘Are you in favour of gun control?’ provides only one alternative to consider. The question should be reworded to something like ‘Do you favour gun control, or are you against gun control?’, which gives respondents more than one alternative. The answer options of a question can also be unbalanced. For example, a respondent could be asked in a neutral way “Please rate your overall health” but required to select from the answers “Poor”, “Good” and “Excellent”.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=51#h5p-20>

Recall/Memory Error

A significant degree of error can be introduced in questions that require respondents to recall events, expenditure, etc., particularly if details are being sought for a long period. The quality of the data collected from recall questions is influenced by the importance of the event to the respondent and the length of time since the event took place. Respondents also tend to remember what should have been done rather than what was done.

Subjects that are of greater importance or interest to

respondents, or events that happen infrequently, will be remembered over longer periods and more accurately. Where possible (eg. with financial information), questions should be framed so that respondents can refer to their own records which would enhance accurate reporting. Minimising the recall period also helps to reduce memory bias.


A specific type of memory error is telescoping. This occurs if respondents report events as occurring either earlier or later than they actually occur, incorrectly bringing events into the reference period. This effect is alleviated somewhat by being very specific about when the reference period begins and ends, for example using “the week ending Saturday 1st September” rather than “last week”.

Intrusive (Sensitive) Questions

Questions on topics that respondents may see as embarrassing or highly sensitive can produce inaccurate answers. Respondents may refuse to provide information on personal issues such as health or income details. If respondents are required to answer questions with information that might seem socially undesirable, they may provide the interviewer with responses they believe are more ‘acceptable’. In these cases, it is often better to provide the respondent with a self-administered questionnaire that the interviewer doesn’t see.



An interactive H₅P element has been excluded from

 this version of the text. You can view it online here:
<https://opentextbooks.library.arizona.edu/fits204/?p=51#h5p-21>

Business survey respondents can also find some topics sensitive, such as IT security breaches or donations to charity, as well as not wanting to reveal commercial-in-confidence information about their business. Business surveys add a new dimension to collecting sensitive data as it is often necessary for different respondents, sometimes from different areas, to complete parts of the form and approve its content. Some respondents might not want others to see particular answers.

The negative effect of sensitive questions may be aggravated if they are placed at the beginning of the questionnaire and can therefore contribute to non-response if respondents are unwilling to continue with the remaining questions. If a sensitive question is further into a form the respondent is more committed to completion, and if they do refuse to continue, the partial response is more useful. Ways of overcoming difficulties associated with sensitive questions may include reassuring respondents that the information they provide is confidential, and not requiring respondents to write their name anywhere on the survey form.

Acquiescence

This situation arises when respondents have a general tendency to agree rather than disagree with anything. It

occurs when respondents are asked whether they agree or disagree with a statement, especially when the supplied statements are presented as plausible generalities. It can also appear for questions requiring a yes or no response.

This tendency can be due to a combination of factors, such as the personality and education level of respondents, as well as conditions of the interview or design of a self-completed questionnaire. Respondents will often agree when the question is ambiguous or otherwise difficult to answer. The effect may be exaggerated when the respondent is fatigued or has to answer a long string of questions with the same response categories. A related effect is satisficing, where respondents select the first reasonable answer rather than make the effort to find or remember the best answer.

Adequate Response Categories

It is important to make sure that there are adequate response categories and that they incorporate every possible response. For example:

Age: 15-19, 21-25

This provides a problem for those respondents whose age is 20.

Another problem that could arise is overlapping response categories. Ranges should always be mutually exclusive. For example:

Age 15-20, 20-25

This provides a problem for respondents whose age is 20 since they could respond in either or both categories.

Response categories also need to be worded carefully, as respondents will use them to clarify or extend the

meaning of the question. For example, if a question using a frequency scale with five points “Never”, “Rarely”, “Average”, “Often”, and “Frequently” a respondent may incorrectly assume the scale represents the population distribution. If they consider themselves to be normal or extreme compared to the population on the activity of interest their answers will differ regardless of the actual frequency they engage in the activity.

Number of Response Options

The number of response categories can influence the quality of the data as both too few and too many categories can cause errors. Too many can cause respondent fatigue and inattention, resulting in ill-considered answers. If there are too few categories respondents may have difficulty finding one which accurately describes their situation.

Don't Know Category

The decision about whether to include or exclude a Don't Know option depends to a large extent on the subject matter. The remaining responses are usually evenly distributed on the negative and positive sides of a scale if this category is excluded, although it depends to a large extent on the nature of the question. Excluding this option may not be a good idea, as respondents may be forced to give an answer when, for example, they really do not know what their attitude is to a particular subject, or they do not know the answer to a factual question that has been asked. When respondents are forced to develop an attitude on the spot this attitude will be highly unreliable.

Tone

A change in wording can result in a change in responses. For example, different responses may be obtained through using the following two questions:

‘Do you think that gun ownership should be forbidden?’

or

‘Do you think that gun ownership should not be allowed?’

Minor changes in wording can also have a significant effect on responses. One should therefore be careful when looking at alternative wordings. The use of negative words like “not” should be avoided in questions as they are easily missed by respondents. In addition, using “not” in a scale such as “Satisfied”, “Neither” and “Not satisfied” doesn’t provide a true opposite. “Dissatisfied” would be a better alternative, however “Unsatisfied” could also be used and would mean something slightly different to respondents.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://opentextbooks.library.arizona.edu/fits204/?p=51#oembed-1>

Step 6: Finalise the Structure and Layout of the Questionnaire

Not only does the wording of questions require attention to detail, but also the ‘look’ of the questionnaire. Poorly designed questionnaires (eg. hard-to-read text) not only serve as a disincentive to respondents completing the questionnaire but can also result in respondents making errors. Some of the important elements of questionnaire structure and layout are outlined below.

Sequencing

The questions on a form should follow a sequence that is logical to the respondents. Regardless of the method used to administer the questionnaire, the sequence should flow smoothly from one question to the next. A smooth progression through the questions is particularly important if the questionnaire is answered in difficult circumstances (e.g. a mother trying to fill in a questionnaire while her children are seeking her attention). It is a good idea to start the questionnaire with pleasant and easy questions to promote interest in the survey, and to give respondents confidence in their ability to answer the remaining questions. In particular, the opening questions should establish that the respondent is a member of the survey population.

The remaining questions should be logically structured so that the interviewer or respondent does not need to alternate between pages of the questionnaire. For example, any explanatory notes should be presented as part of the question they refer to, not on a separate page.

Questions that may be sensitive to respondents should generally not be placed at the beginning of a

questionnaire. Rather, they should be placed in a section of the form where they are most meaningful to the context of other questions. In this way, the format of the questionnaire can act as a buffer to help the respondent feel more comfortable with sensitive questions after establishing rapport.

In self-enumeration questionnaires, to ensure that respondents answer only those parts of the questionnaire that are relevant, filter questions may be used to direct respondents to skip the questions that do not apply to them. Filter questions are also used in interviewer-based surveys to direct interviewers to follow a series of questions according to answers given by respondents. Filter questions need to be used with care as respondents (and interviewers) need to have sufficient information about the skip condition to judge whether the respondent should skip. Filters should also generally be avoided for sensitive topics as respondents will tend to give the answer that avoids answering the sensitive questions.

If the instructions are not clear and straightforward, interviewers or respondents can follow an incorrect sequence or miss questions. In general, only one or two conditions should be placed in each sequence guide. Computer-assisted interviewing and electronic self-completion forms can make complex sequencing much easier.

Filter questions also identify sub-populations. For example:

Q7 'Were you born overseas?'
If 'Yes' go to Q8,
if 'No' go to Q12.

Order of Questions

The order in which the questions appear may influence the responses given to particular questions. Responses given to earlier questions can influence responses to later questions. For example, if a question asks participants whether they believe trade unions are disruptive in the community, and then a later question asks about problems in Australian industry, the negative influence of trade unions on industry may receive much more attention than would otherwise have been the case.

Order of Response Options

The actual order of response options can also introduce bias. The options presented first may be selected because they make an initial impact on respondents, or because respondents lose concentration and do not hear or read the remaining options. Equally, the last options may be chosen because they are more easily recalled, particularly if respondents are given a long list of options. Thus, the order of response options has a greater effect on data quality when a question includes a large number of response options.

If possible, options should be presented in a meaningful order. If some options are more socially desirable than others these should go last to reduce bias. For example, an education question should present the qualifications in order from lowest to highest. For some self-completed lists, alphabetical order is the most appropriate to help the respondent find which option they want, for example, if respondents have to select which crops they produce.

Response Options and Respondent

Difficulties

When the survey is interviewer-based, the response options can be presented either verbally or on a prompt card. A prompt card is a list of possible responses to a question that are shown by the interviewer to assist the respondents. This helps to decrease errors resulting from respondents being unable to remember all the options read out to them. However, respondents with poor eyesight, migrants with limited English, or adults with literacy problems will experience difficulties in answering accurately.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=51#h5p-22>

Length

The length of a questionnaire can be described in different ways. Survey designers tend to worry about number of pages, whereas the number of questions (especially mandatory ones) and the time taken to complete are usually more important. How long is too long varies across mode of data collection, the ease and interest of the topic and the design of the questionnaire. Towards the end of a long questionnaire, respondents may give less thought to their answers and concentrate less on the instructions

and questions, thereby decreasing the accuracy of the information they provide. If a respondent is told an interview will last several hours, or they receive a questionnaire that is many pages thick, that can lead the respondent to refuse to participate at all.

Questionnaire Layout

Respondents or interviewers using a questionnaire with poor layout can miss questions, follow an incorrect sequence or enter responses in the wrong response box, which will result in missing or incorrect data. Poor layout can also contribute to errors at the processing stage. For example, if response boxes are not aligned some answers may be missed completely during the data entry.

Particularly for those questionnaires which are completed by respondents, the design may contribute to errors as a result of:

1. poor legibility (e.g. unclear printing or very small text);
2. violating the normal reading path of the respondent (English readers expect to read from top left to the bottom right and e.g. big headings and bright pictures in the middle of pages disrupt this);
3. instructions which can be easily overlooked (e.g. those which are not clearly differentiated from the questions or are not placed near the relevant part of the question); and
4. inadequate space for answers.

Physical Design

The questionnaire should be physically set out so as to minimise the time needed to interview, respond and process the results. Specifically, consideration should be given to the form's construction, graphics, and layout. Poor layout leads to mistakes in understanding questions and recording the responses. In general, the questionnaire:

1. needs to be understood by respondents, interviewers, and processors. This is done by providing clear instructions. For respondents, this means an adequate layout of questions and response categories with appropriate sequencing. Interviewers require prompts to be clearly understood and response codes need to be adequate for processors;
2. should have a good appearance as it might affect the response, i.e. the questionnaire should be well designed and presented and therefore easy to answer;
3. should clearly identify the date, title, and the organisation;
4. should clearly outline the purpose of the survey;
5. should assure respondents about the confidentiality of the information they are providing;
6. should provide a contact number so that respondents can obtain help if they require it and due date; and
7. should have pages that are numbered consecutively, with a simple numbering system.

Step 7: Testing the Questionnaire

Once the understanding of concepts and definitions has been investigated through focus groups, a rough questionnaire can be produced and tested informally on a small group of people, perhaps one's colleagues at work. Such testing is not intended to obtain representative results but aims to find out the major flaws with the questions, for example, awkward wording. This testing is designed to take the 'rough edges' off a questionnaire. It is a good idea to use open questions to work out the likely responses. The questions can be restructured and developed into a draft questionnaire which can be used in rounds of informal pretesting and later pilot testing.

Conclusion

Questionnaire design begins by clarifying the objectives of the survey, determining the data which is to be produced by the survey and devising a list of questions to obtain this data. Careful consideration should be given to a number of factors, including the type of questions to be used, the logical sequence and wording of questions, and the physical design of the form. It is important to test each of these aspects of questionnaire design with a group of respondents before finalising the questionnaire. If necessary, the form can then be modified and retested until respondents can complete it accurately and quickly with a minimum of errors.

CHARLETTE

About the Author



Aila Khan
WESTERN SYDNEY UNIVERSITY

10.

Extra Reading 5 – Artificial Intelligence and Information/ Research

AILA KHAN

Learning Objectives

By the end of this chapter, students must be able to:

- Describe the role of Artificial Intelligence in Marketing Research
- Understand the benefits of Artificial Intelligence in Research
- Explain the limitations of Artificial Intelligence technology



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://opentextbooks.library.arizona.edu/fits204/?p=64#oembed-1>

Source: Digital Marketing Made Easy ¹

The following material is derived from Huang and Rust² and is used under a [Creative Commons Attribution ShareAlike 4.0 Licence](#).

Artificial intelligence (AI) in marketing is currently gaining importance, due to increasing computing power, lower computing costs, the availability of big data, and the advance of machine learning algorithms and models. We see wide applications of AI in various areas of marketing. For example, Amazon.com's Prime Air uses drones to

1. Digital Marketing Made Easy 2021, *Artificial intelligence explained in 3 minutes: 3 applications in marketing*, 14 May, online video, viewed 10 May 2022, <<https://www.youtube.com/watch?v=jBaHg4QKAc>>.
2. Huang, MH & Rust, RT 2020, 'A strategic framework for artificial intelligence in marketing', *Journal of the Academy of Marketing Science*, vol. 49, pp. 30-50, viewed 11 May 2022, <<https://link.springer.com/article/10.1007/s11747-020-00749-9>>

automate shipping and delivery. Domino's pizza is experimenting with autonomous cars and delivery robots to deliver pizza to the customer's door.

Artificial intelligence (AI) refers to intelligence demonstrated by machines, as opposed to the natural intelligence displayed by humans and animals. Artificial Intelligence is, machines behaving intelligently and undertaking problem-solving or completing tasks. It is a very broad subject that involves computer science, cognitive science, mathematics, philosophy, neuroscience, linguistics, etc.

Artificial Intelligence (AI) and Marketing Research

AI can be used in three different ways in marketing research: a) data collection; b) market analysis; and c) understanding the customer and developing key insights.

AI and Data Collection:

AI can automate data collection about the market, the environment, the firm, the competitors, and the customers. In the digitally connected world, market data can be easily tracked and monitored. Data sensing, tracking, and collection are routine, repetitive tasks that can be easily automated via AI. Existing studies have shown various ways of using AI for data collection. For example:

- customer intelligence, including data about consumers, their activities, and their environments, can be collected if they use connected devices (e.g., wearable devices, smart fridges, and digital assistants such as Siri)
- product usage and consumption experience can be visualized with Internet of Things (IoT)
- various advanced technologies and analytics can capture unstructured marketing activity data
- in-car sensors can track driving behavior for determining insurance premiums
- retail technologies, such as heat maps, video surveillance, and beacons, can be used for profiling and recognizing retail shoppers

Previous studies show that, given the repetitive, routine, but high-volume nature of market data, AI can collect data efficiently at scale. The data collection capability of AI is not limited to observable behavioral data; it can also be used to facilitate survey or experimental data collection to capture consumer psychographics, opinions, and attitudes. For example, human administration and supervision of ongoing surveys are no longer required and can be automated. SurveyMonkey and SurveyCake are two commercial survey platforms that automate survey design and data collection. By incorporating the principles of gaming and AI better quality data is being collected online. Online surveys have become more fun and engaging. Survey participants are also more likely to complete such surveys and recommend them to others. In fact, by using AI technology, researchers believe that in

the next few years, nearly 1 in 4 surveys will be spoken to a digital assistant (Qualtrics 2022).

AI and Data Analysis:

AI can be used to analyse information. Here are a few examples of how researchers have used AI to undertake analysis:

- Automated text analysis is applied to gain insights into consumers' behaviour (e.g., by analysing customer reviews on a website)
- Machine learning algorithms and lexicon-based text classification is used to analyse various social media datasets
- Big data marketing analytics is a mainstream approach for generating marketing insights. Specific applications include mapping market structures for large retail assortments using a neural network language model, by analyzing the co-occurrences of products in shopping baskets, detecting copycat mobile apps using a machine learning copycat-detection method, and aiding social media content engineering by employing natural language processing algorithms that discover the associations between social media marketing content and user engagement

AI and Improved Understanding of the Customer:

AI can be used to understand existing and potential customer needs and wants, for example, who they are, what they want, and what their current solutions are. The major distinction between market analysis and customer understanding is that the latter often involves emotional data about customer sentiments, feelings, preferences, and attitudes. Thus, AI does not only churn out quick numbers, it also has the capability of analyzing emotional data. For example, Affectiva partnered with Ford to create AutoEmotive sentiment analysis, to try to figure out drivers' emotional states.

For potential customers, marketers can use feeling AI to understand what they want and why they are happy with competitors or outside options. Some marketers may feel that potential customers' needs and wants are more difficult to predict as their emotional data is less available. However, Unilever has proved otherwise. With the help of AI data centers, Unilever synthesized insights through social listening and CRM, and discovered a link between ice cream and breakfast. Unilever discovered that there were at least 50 songs with 'ice cream for breakfast' in their lyrics (which people were listening to), as well as Dunkin Donuts selling ice cream during the morning part. With this insight, Unilever developed a new brand Ben & Jerry's with a range of cereal-flavored ice-creams for breakfast.



An interactive H₅P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=64#h5p-28>



An interactive H₅P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fts204/?p=64#h5p-20>

Limitations of Artificial Intelligence



Financial and Human Resource Cost:

Using AI requires financial and human resources. The initial cost of setting up an AI infrastructure is always resource-intensive. Thus, it may not be feasible for all organisations. Investing in AI can mean heavy expenditures on data acquisition, computing, and storage equipment, as well as spending on recruiting relevant personnel and training them. As with all investments, the returns may not be immediate. It may take a while to realise the benefits of using AI.

AI systems should not be seen as a replacement for human capital. In fact, AI systems only work best when it is best integrated with the expertise of the organisation. It is not advisable to leave customers or suppliers at the mercy of a 'digital assistant'. There are numerous case studies that demonstrate the limitation of such an approach.

Unrealistic Expectations from AI/ Threatened by AI:

At times, managers can have unrealistic expectations from AI technologies. Not all aspects of AI will add value to all business operations. Managers need to analyse what is feasible for achieving specific objectives. The author of this book has worked in the area of social robotics. Deploying a social robot within a business environment often posed challenges. Either the expectations of the business managers were too high for the social robot (e.g.,

“will it be able to answer the phone?”) or – in some cases – it did not help with their overall communication objectives. In another few cases, employees were threatened with the arrival of a social robot as they feared job losses. In many instances, the overall evaluation of the technology was undertaken by individuals who may have had a bias towards the use of the machine.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://opentextbooks.library.arizona.edu/fits204/?p=64#h5p-30>

About the Author



Aila Khan
WESTERN SYDNEY UNIVERSITY

PART V

ASSIGNMENTS AND PROJECT IDEAS

Assignments & Project Ideas

For the past few years I have worked with students on open pedagogy assignments and projects from which I draw my inspiration. Students have contributed to the open textbook through their persuasive writing assignments and have developed content that will serve future students in this course. This collection of assignments and projects reflects my own teaching style and adaptations of other educators who have shared generously and inspired me endlessly.

1. **The Op-Ed Writing Template:** This simple and paired-down op-ed template provides students with a framework to develop evidence-based persuasive writing techniques while still infusing their own

perspectives and lived experiences. This format was used throughout the open textbook as seen in the many student submissions.

2. **The Op-Ed Writing Sample:** Before embarking on an ambitious persuasive-writing assignment, why not have students critically analyze an op-ed first and identify its key components? This “sampler” provides ideas on how to walk students through an op-ed analysis, and in some cases, this may be enough to satisfy the learning outcomes where writing/creation isn’t required in a course.
3. **Persuasive Writing for Peer Review:** A shorter version of the op-ed, this framework provides students with a balance of creating & analyzing persuasive writing. The peer review format also allows for more frequent smaller assessments in a course and provides scaffolding for a final or larger submission based on student-revised work.
4. **Annotating Learning in an OER:** Students can annotate anything using Hypothesis and be invited to summarize their annotations or suggest new/revised content. This is particularly useful for students who may be involved in future OER-authored projects.
5. **Cultural Literacy Assignment:** Developed during the SDG Open Pedagogy Fellowship at KPU, this assignment is equal parts visual literacy, data literacy, and cultural literacy and gives students an opportunity to critically examine the ongoing relationship between marketing and cultural.
6. **Teachable Content Assignment:** Learning from peers

is at the heart this assignment where students can not only create relevant, meaningful, and relatable teachable content, but also infuse their lived experiences and stories. Students engaged in OER work may wish to bring variability to their creations using H5P and other digital tools (e.g., video, audio, etc.).

7. **Teachable Content Student Examples:** A host of examples using H5P have been included to provide a sampler of the imagination and creativity students can bring to an OER and to future learners.
8. **Chapter Summary Assignments:** Diffusing the main ideas of a chapter into a smaller sample size provides students with another way to engage with the open textbook. Using H5P to create chapter summaries allows for greater learner variability and variety.
9. **Coronavirus Reflection:** This assignment gives voice to students and invites them to share their lived experiences as consumers during the pandemic. Similarly, students could also be invited to share their experiences, perspectives, attitudes, and behaviour (consumption decisions) as consumer activists or in response to social justice campaigns used by businesses and brands.

PART V

PART 4 DRAFTING

Now that you've planned out your document and gathered information that meets your audience's needs, you're just about ready to start drafting the document's message. At this point, it's worthwhile reminding yourself that the words you start entering will look different from those your reader will eventually read. By the end of the drafting stage examined in this part, your document will be partway there, but how much revising you do depends on how effectively you've organized your message.

In this part, we will cover:

- [Choosing an Organizational Pattern](#)
- [Outlining Your Message](#)
- [Writing in the Business Standard Style](#)
- [Effective Document Design](#)

Chapter 16: Effective Document Design

ANNA CAPPUCCITTI

Learning Objective

1. Apply the principles of reader-friendly document design to various written formats.

The responsibility of a writer to produce reader-friendly documents extends to layout, design, and organizational elements surrounding the words themselves. If an email or report were simply a wall of undifferentiated text running for several screens or pages, any reader would be daunted by the prospect of having to scale that wall. Fortunately, writers can use document templates that make those design choices for them with established styles so that writing a document becomes a matter of just filling in the blanks; if you work for a company that uses templates for certain documents, of course you will use them also for consistency and your own convenience. Even without

templates, however, you can use several techniques to help guide your readers' eyes across the page or screen to easily find what they're looking for. Rather than being optional nice-to-haves, such techniques are crucially important to how well your document is received.

Almost every business document that exists as a standalone unit must have a title that accurately represents its contents. It's the first thing a reader looks for to understand what the document is all about and should thus be easily found centred at the top of the first page of any small document, and prominently placed on the cover of larger reports. Even emails and memos have titles in the form of subject lines. In whatever document you find it, a title's following characteristics make it essential to your reader's understanding of the whole:

- **Topic summary:** A title is the most concise summary possible of a topic. If you glance at a news website or newspaper, for instance, you can get a reasonably good sense of what's going on in the world just by reading the headlines because they are titles that, in as few words as possible, summarize the narratives told in the articles that follow.
- **Conciseness:** Aim for a length in the 2- to 7-word range—something that can be said repeatedly in one short breath. One-word titles are appropriate only for art (e.g., for books, films, songs, albums, etc.), but most other professional documents use a reasonable number of words to give a sense of the topic, albeit streamlined to the point of having no words that don't absolutely need to be there. In scientific papers, titles can be quite long

and carry plenty of detail, though you can expect that their audiences will rarely pronounce the full title.

- **Capitalization:** Capitalize the first word no matter what, as well as all major words (nouns, verbs, adjectives, adverbs, pronouns, etc.) thereafter.
 - Don't capitalize [prepositions](#) (e.g., *on*, *to*, *from*, *in*, *out*, *of*), [conjunctions](#) (*and*, *but*, *or*, *for*, *nor*, *so*, *yet*), nor [articles](#) (*the*, *a*, *an*) unless they're the first word of the main title or subtitle (Darling, 2014a, 2014b, 2014c).
 - When including a hyphenated word (i.e., with a compound-modifier hyphen), leave the second word, the one immediately following the hyphen, lowercase (see the first two examples in the titles listed at the end of this subsection).
- **Structure:** Use a noun, verb, or adjective phrase rather than a complete sentence.
 - **Main title:** If your title comes in two parts with a main title and subtitle, the main title establishes the general context of the topic, perhaps with catchy or clever phrasing, and ends with a colon (:) with a single space after it but none before.
 - **Subtitle:** The subtitle follows the main title with a more specific and detailed summary of the document topic.
- **Position:** Centre the title at the top of the page

and include 1-2 empty lines below it to separate it from the opening text.

- **Typeface:** Use bold typeface to help draw the eye towards the title, as well as colour if appropriate.

For examples of titles that are near at hand, see the References sections at the end of most chapter sections throughout this textbook. The following collects a small selection of them:

- “Consensus on Consensus: A Synthesis of Consensus Estimates on Human-caused Global Warming” ([Cook et al., 2016](#))
- “Fake News: Facebook and Matters of Fact in the Post-truth Era” ([White, 2017](#))
- “Instagram Ranked Worst for Young People’s Mental Health” ([RSPH, 2017](#))
- “Gray Matters: Too Much Screen Time Damages the Brain” ([Dunkley, 2014](#))
- “Higgs Boson Researchers Mocked for Using Comic Sans Font” ([CBC, 2012](#))
- “Ottawa Severs Ties with Plasco as Company Files for Creditor Protection” ([Chianello & Pearson, 2015](#))
- “Problematic Technology Use: The Impact of Capital Enhancing Activity” ([Phillips, 2015](#))
- *The Process and Effects of Mass Communication* (Schramm, 1954)
- “Understand How Consumers Use Messaging: Global Mobile Messaging Consumer Report 2016” ([Twilio, 2016](#))
- “Who Multi-tasks and Why? Multi-tasking Ability, Perceived Multi-tasking Ability,

Impulsivity, and Sensation Seeking”
([Sanbonmatsu et al., 2013](#))

For more example titles, go to [Wikipedia.org](#) and search for articles on any business or technology topic, scroll down to the References section at the bottom, and see an abundance of legitimate titles.

Headings and Subheadings

After the main title of a document, using headings and subheadings as titles for sections and subsections helps guide the reader around a document’s breakdown of topics. Especially in reports, headings and subheadings that stand out in bold typeface flush (or close) to the left margin and follow a consistent numbering system, exactly as you see in this textbook, help a busy reader quickly locate any specific content they seek. Even a routine email that covers a topic in so much detail that it could be internally divided—without being so big that its content should just go into a document attachment—would benefit from bolded headings.

If your drafting process follows the guide in this chapter, then you would have already drafted your headings and subheadings (and possibly numbering if necessitated by the size of the document) in your outline (see [unit 12](#)). The drafting process of fleshing out that outline may suggest tweaks to those heading and subheading titles. As titles, headings must be properly phrased and capitalized like main titles.

When using a word processor such as Microsoft Word, you can achieve additional functionality by using “true headings.” From the Home menu tool ribbon, heading

styles are available as options in the Styles section. If you prefer to design your own styles of headings, you can click on the downward triangle at the bottom right of the style examples field and select “Create a Style.” Doing this allows you to see your entire document at a glance on the left and quickly jump to any section you wish by clicking on the Navigation Pane checkbox in the Show section of the View menu tool ribbon (or Alt + w, k), then clicking on the heading for the section you want. This is especially useful in larger documents like reports. Additionally, using such headings makes your document accessible to audiences with assistive technologies such as screen readers (see text below on AODA compliance).

Font

Font selection is an important consideration because it determines how the audience will receive a document. Font involves decisions concerning the style of type, size, and even colour. Consider the following:

1. Font Type

Writers considering typeface must choose between two major style categories depending on how they would like to accommodate their reader.

Serif fonts like Times New Roman and Garamond have little perpendicular crossline “feet” or “hands” at the ends of letter strokes, as well as variable thickness in the strokes

themselves depending on their horizontal/vertical or curving position, which altogether help readers distinguish between similar letters or combinations of letters, such as *m* and *rn*, which almost look like the same letter in a non-serif font. Serif fonts are ideal for printed documents, especially those with smallish font sizes such as newspapers. Without serifs, sans-serif fonts like Arial (the one used in this textbook) or Verdana achieve a more clean and modern look, especially on computer screens where serif fonts appear to whither away at the thin part of the stroke and are thus harder to read. In the appropriate format, all the fonts mentioned above make a document look respectable. Comic Sans, on the other hand, is appropriate for documents aimed at children, but undermines the credibility of any professional document, such as when the unfortunate choice to use it when reporting CERN particle physics discoveries became more newsworthy than the discoveries themselves ([CBC, 2012](#)).

Times New Roman

Garamond

Arial

Verdana

Comic Sans

Papyrus

COPPERPLATE

2. Font Size

Size is another important consideration because readers depend on text being an ideal size for readability and are frustrated by font sizes that are bigger or smaller than that. In a standard written document, for instance, a 12-point Arial or Times New Roman is the recommended size by the Accessibility for Ontarians with Disabilities Act (AODA). If the MS Word default size when you open a blank document is 11-point, it's worth increasing it for the sake of those who have slight visual impairment. Increasing the size much past 12-point has a similar effect as using the Comic Sans font type: it makes your document appear to be targeting an audience of children. Of course, situations where you want to increase the font size abound, such as for titles on title pages so that the eye is drawn immediately to them, and any time readers are required to read at a distance, such as posters on a notice board or presentation slides. As we shall see, the ideal font size for bullet points in a PowerPoint is in the 30- to 35-point range, whereas a 12-point font will appear microscopic on a projector screen, if not invisible, from across the room.

Occasions for going smaller with your font size include footnotes in a report or source credits under images in a document or PowerPoint presentation. Decreasing font size to 8-point merely to get all your text to fit into a one-page résumé, however, would undermine the document's purpose because, by frustrating the hiring manager trying to read it, it runs the risk of prompting them to just dump it in the shredder and move on to the next (hopefully reader-friendly) résumé. In such cases, choosing the right font size becomes a major life decision. Whatever the

situation, strike a balance between meeting the needs of the reader to see the text and design considerations.

3. Font Colour

A choice of colour may also enter into document design considerations, in which case, again, the needs of the reader must be accommodated. Used appropriately, a touch of colour can draw the eye to important text. Colouring your name red at the top of your résumé is effective if few or no other elements in the document are so coloured because your name is essentially the title of your document. Likewise, colouring the title of other documents is effective if there are no expectations of doing otherwise (some company style guidelines forbid colour).

Any use of colour for text must be high-contrast enough to be readable. The gold standard for high-contrast readability is black text on a white background. Grey-on-white, on the other hand, sacrifices readability for stylishness depending on how light the shade of grey is. A light-yellow text on a white background is nearly impossible to read. In all cases, the readability of the text should be considered not just for those with perfect vision, but especially for those who find themselves anywhere on the spectrum of visual impairment (see text on accessibility below). For this reason, colour should always be used to enhance a document that is already perfectly organized without it; never use colour-coding alone as an organizing principle in a document read by anyone other than you because you can never be sure if some readers will be colour blind or have other visual

impairments that render that colour coding useless as a cause for confusion.

4. Boldface, Italics, and Underlining

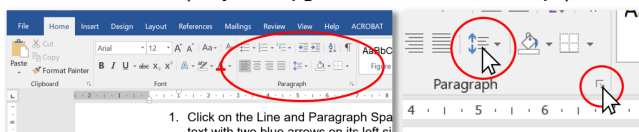
Boldface, *italics*, and underlining serve various purposes in focusing audience attention on certain words. Boldface type is especially helpful in directing audience eyes towards titles, headings, and keywords as you can see at the beginning of this paragraph and throughout this textbook. Highlighting in this way is especially helpful to anyone who is visually impaired in any degree. Of course, overusing boldface undermines its impact, so it should be used sparingly and strategically. Likewise, italics and underlining have very specific purposes that we will look at under the banner of mechanics.

Line Spacing

Single-spaced lines are common to most business documents because they accommodate the reader's need to dart quickly to the next line to continue reading a sentence. The gap between 1.0-spaced lines is just enough to clearly separate one line from another so the hanging elements at the bottom of letters like *j* and *g* don't interfere with the tops of uppercase letters on the line below. Some documents such as academic manuscripts are double-spaced to give readers, who are usually the instructors or teaching assistants grading them, enough space to write comments and editorial marks between the lines. Because doubling the line spacing also doubles the number of pages in a print version, avoid double-spacing documents for audiences who don't explicitly require it.

Frustratingly, some word processors such as Microsoft Word open blank pages with line spacing values other than single (1.0) spacing as their default setting, such as 1.08 or 1.15. In such cases, a couple of adjustments are necessary if you want to single-space a document you're writing from scratch. Make these adjustments as soon as you open a blank page or by highlighting all (ctrl. + a) if you've already started. In MS Word's Home menu:

1. Click on the Line and Paragraph Spacing icon that has four lines representing text with two blue arrows on its left side, one pointing up and one down, in the Paragraph section of the Home menu ribbon (or just type the *Alt + h, k* keys).



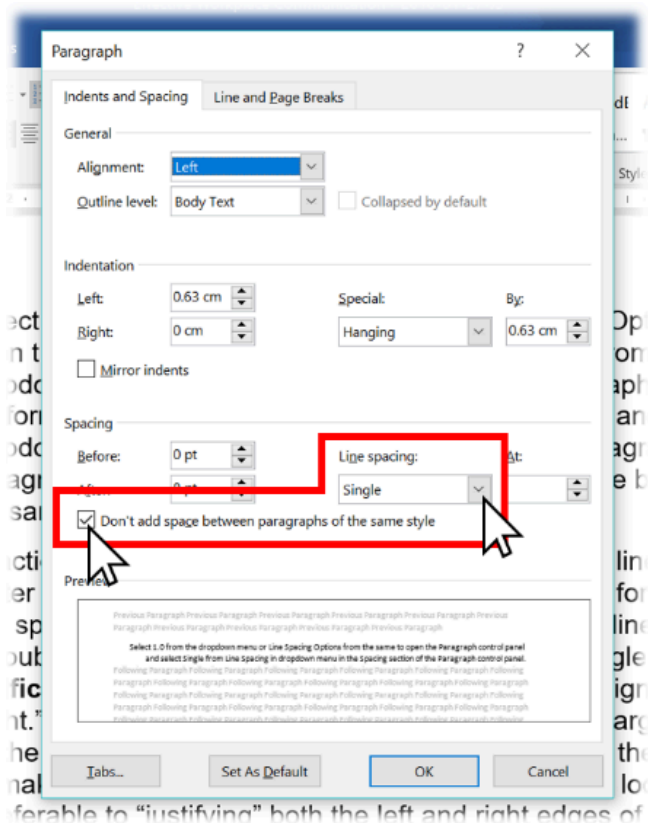


Figure 14.1: Where to click to get line-spacing options in the MS Word tool ribbon (above) and Paragraph control panel (right)

2. Select 1.0 from the dropdown menu or Line Spacing Options from the same to open the Paragraph control panel, and select Single from the Line Spacing dropdown menu in the Spacing section.
3. Perform the same two steps as above to get the Line and Paragraph Spacing dropdown menu, and select Remove Space After Paragraph or, from the Paragraph control panel, click on the

“Don’t add space between paragraphs of the same style” checkbox and the Okay button at the bottom to apply the style.

The third action above prevents MS Word from adding a full line of space every time you hit Enter at the end of a line. When typing address lines for a letter without the “Don’t add space” checkbox ticked, for instance, the default line spacing will continue to look like double spacing even if you set the line spacing to single.

Justification should ideally be left as the default left-aligned or “Left-justified / ragged right.” This means that all lines are flush to the left margin and the lines end wherever the last full word fits before the right margin sends (or “wraps”) the next word down to the next line, making each line vary in length so the right margin looks “ragged,” as you can see throughout this textbook. This is usually preferable to “justifying” both the left and right edges of the text so that they align perfectly along both the left and right margins, as in the paragraph below. While this may look clean like newspapers often do with their columns, it does so by adding space between the words within each line, and since every line varies in length without justification, every line with it will vary in the amount of space added between words. Some lines that would be short without justification look awkward with it because the space between some words is greater than the span of small words.

To fix the “hockey teeth” gaps resulting from justification such as what you see in parts of this paragraph, turn on hyphenation in MS Word via the Layout tool ribbon: select Automatic in the Hyphenation dropdown menu in the Page Setup section. This

automatically adds hyphens between syllables of long words whose size and position at the end of a line would otherwise send them entirely to the beginning of the next line, decreasing the number of words in the line above and increasing the gap between each. If working in a company document template with justification, keep the justification throughout to be stylistically consistent with other documents produced in that template and ensure that the hyphenation is turned on. Otherwise, left-aligned text is perfectly fine and may even help readers find their place if they lose it momentarily compared with the uniform brick-wall effect of justified text seen here.

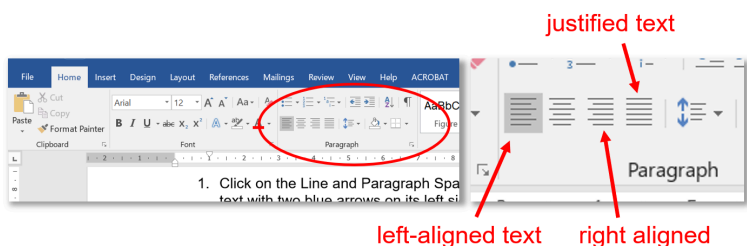


Figure 14.2: Where to click to select text justification or left-aligned (“ragged right”) text in the MS Word Home menu tool ribbon

Lists

Another technique that helps the reader skim and easily find sought-after content is numbered or bulleted lists for a series of discreet but related items. Whether you use numbered or bulleted lists depends on your organizing principle:

Use Bulleted Lists for:

- An unprioritized collection of related points
- Points on a presentation slide (e.g., PowerPoint) for easier readability

Use Numbered Lists for a:

- Step-by-step **procedure** such as a set of instructions
 - Description of a **chronological sequence** — a series of events unfolding in time
 - **Rankings** that arrange items in priority order
-

You've seen numbered and bulleted lists used throughout this textbook (e.g., the two bulleted lists immediately above and a numbered one in the section prior to this). Whichever list type you use, ensure each has the following:

- A **sentence or phrase** introducing and explaining the list and ending with a colon before delivering the list immediately below it as you can see in the sentence that introduces this list
- **Capitalization** of the first letter in each point
- **Periods** ending each point only if it is a complete sentence on its own, whether it be in the declarative, imperative, or any other mood; a list of nouns or noun phrases, on the other hand, doesn't end in periods
- **Parallelism** in the sense that each point in a list follows the same grammatical pattern, such as only full sentences, only noun phrases, or only verb phrases; for instance, each point in the three bulleted lists in this section (including the present one) is a noun phrase (i.e., it begins with a noun) and the numbered list above, as a step-by-

step procedure, is a sequence of imperative sentences (i.e., each begins with a verb: “Click,” “Select,” “Perform”).

The need for parallelism extends also to lists within a sentence.

Visual Aids

The cliché that a picture is worth a thousand words holds true because images are excellent aids to understanding when placed near the messages they illustrate. Just as the visual elements in this textbook support and reinforce the content, so do photos, graphics, charts, and graphs provide readers something that can be understood and remembered at a glance—as long as those visuals are used appropriately. Of course, the main criterion for usability is if the image helps the reader understand the text better. If the image is complementary, it can only help. If it is unnecessary, confusing, or contradicts the text, however, the image isn’t worth the time and effort it takes to add it to your document. When considering using an image, ask yourself:

- **Aesthetic considerations:**
 - Does the image look good?
 - Are the colours complementary?
- **Technical considerations:**
 - Is the image resolution of sufficiently high quality?
 - Or is it too pixelated to use?
- **Legal considerations:**

- Does the image's copyright licence permit or forbid use by others?
- Am I using the image for educational or commercial purposes?
- **Design considerations:**
 - Is it big enough to see?
 - Is it placed appropriately?

The ideal size depends on the resolution, detail of the content, relative importance, and the use to which the document will be put. The following guidelines help ensure that the images you use will meet aesthetic, design, technical, and legal expectations:

- **Aesthetic guidelines:**
 - Choose images that look like they were produced by professional photographers, illustrators, or graphic designers—the sort you would see in a magazine or professional industry website.
 - Professionals usually produce images with a limited palette of colours that work well together.
 - Use images that are in focus and well-framed with the central image clearly visible rather than too far in the background or so close that important aspects are cropped out.
- **Design guidelines:**
 - An image or graphic that is crucial to the reader's understanding and is highly detailed really deserves to stretch across the text block from margin to margin.

- An image that is more ornamental and relatively simple can be inset within the text either on the left or right margin, or centred on the page without text on either side.
 - Important images, especially those labelled as figures, must be placed as near as possible to the text they support and even referred to in the text (“See Figure 2 for an illustration of . . .”)
 - Ensure that the text and corresponding image aren’t separated by a page break if the text is close to the top or bottom of the page. The reader’s eye must be able to move between the image and corresponding text in the same field of view to seal their understanding.
- **Technical guidelines:**
 - Screen resolution must be at least 72dpi (dots per inch), the internet standard; anything less than 72 may appear pixelated even on the screen, especially if maximized in size across the page.
 - Images in documents that will be printed should be 300dpi to avoid appearing pixelated on paper.
 - Preferred image file types include JPEG (.jpg) and PNG (.png). The latter includes the possibility of contouring so that the image doesn’t necessarily have to be a square or rectangle.

- **Legal guidelines:**
 - To stay on the right side of copyright legislation, searching online for images that are free to use is easy by including licensing status in an advanced Google Image search. From the Google Images search screen:
 1. Click on the Settings spring-up menu at the bottom right.
 2. Select Advanced Search.
 3. Scroll down and click on the “usage rights” dropdown menu at the bottom.
 4. Select “free to use or share” or whatever licensing status suits your purposes.
 - Otherwise, you can acquire the right to use images for commercial purposes by purchasing them from stock photo vendors such as [Getty Images](#), [Adobe Stock](#), or [Shutterstock](#).

With modern word processors, placing an image is as easy as dragging and dropping the image file from a folder into a document (or copying and pasting). Sometimes you will need to be a little craftier with capturing images, however. For instance, if you need to capture a still image of a YouTube video to use as an image, you can pause the video at the moment you would like to capture and use your computer’s screen-capturing program to get the image.

- On a Windows-based computer:

1. Open the included [Snipping Tool](#) (Microsoft Support, 2017) to turn the cursor into crosshairs.
 2. Click and drag the crosshairs to select the desired portion of the screen for capturing; when you release the cursor, the captured image will open immediately in the clipboard. Ensure that you've included only the elements necessary, rather than the whole screen, plus a short span of margin on each side.
 3. Save the image in a folder from the clipboard or add it directly to the document by switching immediately to the document window (Alt + tab) and pasting it (ctrl. + v) wherever you've placed your cursor.
- On a Mac, use Shift + Command + 4 and use the crosshairs to select the desired portion of the screen ([Apple Support, 2017](#)).

Once your image is in your document, use the layout options to place it where appropriate. Clicking on it may produce a layout icon near the top right that you can click on to open the dropdown menu (alternatively, you can right-click on the image and select the Wrap Text option from the dropdown menu). The default setting left-justifies the image and displaces the text around where you put it, but other layout options allow you to place it elsewhere on the page so that your text wraps around it ("Square," "Tight," or "Through") or so that text doesn't

move around it at all (“Behind” or “In front of text”), which gives you the freedom to move the image anywhere.

Interactive Elements

Another aid to understanding that can benefit readers of an online or electronic document is a weblink that provides them with the option of accessing other online media. Hyperlinking is easy in modern word processors and online applications such as websites and email simply by highlighting text or clicking on an image and activating the hyperlinking feature. Press the control and k keys simultaneously (Ctrl + k), paste the web address into the URL field (copy it by clicking on the web address bar or keying Alt + d, then Ctrl + c), and hit the Okay button ([Microsoft Office Support, 2016](#)). Users prefer links that open new tabs in their browser rather than take them away entirely, so seek out that option when hyperlinking. By doing this for an image of a YouTube video screenshot, for instance, you enable readers of a document (including a PowerPoint presentation) to link directly to that video in YouTube rather than embed a large video file in your document. You can additionally link to other areas within a document, as the document version of this textbook does with links to various sections like the one in the previous sentence.

Balancing Text and Whitespace

Another consideration that helps a reader find their way around a page is the balance of text and whitespace, which is simply a gap unoccupied by text or graphic elements. The enemy of readability is a wall of text that squeezes

out any whitespace, whereas a well-designed document uses whitespace to usher the reader's eyes towards units of text. Margins should be 3cm or 1" (2.54cm), which are the default margin sizes in most word processors' (e.g., Microsoft Word's) blank 8.5"x11" document. Margins also focus attention on the text itself, which makes any crowding of the margins an offense to good design. An attempt to cram more information into a one-page résumé by edging further and further into the margins, for instance, follows the law of diminishing returns: the hiring manager might take your sacrifice of the document's readability as a sign of selfishness—that you place your own needs above that of your audience, which suggests you would do the same to the customers and management if it suited you.

Making Accessible, AODA-compliant Documents

The [Accessibility for Ontarians with Disabilities Act \(2005\)](#) sets out guidelines for how workplaces can help people with disabilities, including accommodations that extend to document design. Many of the recommendations covered in this unit, such as font size and colour, are justified as accommodations to people with even mild visual impairment. Someone with colour blindness, for instance, may be confused if you use coloured text alone as an organizing principle, which is why you should use colour only to enhance text readability while using other means of organization such as boldface type. Not only must you accommodate such individuals, but also those whose severity of impairment requires that they use assistive technologies such as screen

readers that convert text to automated voice. The more straightforward your text is presented, as well as formatted with “true headings” that a screen reader can identify as headings, the easier a person with a disability can hear and understand your message when it’s read out by a screen reader.

Once you are done drafting your document, you can begin to check for any accessibility issues and act on them right away. In MS Word, just to go to File and, in the Info tab, select the “Check for Issues” button in the Inspect Document section. It will identify accessibility problems in your document as well as suggest fixes (watch the video below for a demonstration). For instance, if you have a photo without alt text, it will prompt you to write a caption by right-clicking on the image, selecting “Edit Alt Text...” from the dropdown menu, and writing a one- or two-sentence description of the image so that users with screen readers will be able to hear a description of the image they can’t see very well or at all. See the [Creating Accessible Documents](#) resources (Algonquin College, 2013) for more on how to make your documents AODA compliant.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://opentextbooks.library.arizona.edu/fits204/?p=132#oembed-1>

Key Takeaway

Make your document easy to follow at a glance and accessible by using a variety of document design features such as titles, headings/subheadings, lists, visual aids, interactive elements, line spacing, and appropriate font types, sizes, and colors.

References

Academic Algonquin. (2013, July 29). *Using the accessibility checker* [Video file]. Retrieved from https://www.youtube.com/watch?time_continue=62&v=mSY2EyAorH4

Algonquin College. (2013). Creating accessible documents. *Accessibility Resources*. Retrieved from <https://www.algonquincollege.com/accessibility-resources/accessible-education-tools/creating-accessible-documents/>

Apple Support. (2017, November 20). How to take a screenshot on your Mac. Retrieved from <https://support.apple.com/en-ca/HT201361>

Butterick, M. (2013). Bad fonts. *Practical Typography*. Retrieved from <https://practicaltypography.com/bad-fonts.html>

CBC. (2012, July 4). Higgs boson researchers mocked for using Comic Sans font. *CBC News*. Retrieved <http://www.cbc.ca/newsblogs/yourcommunity/2012/07/do-you-use-the-comic-sans-font.html>

Darling, (2014a). Prepositions. *Guide to Grammar and Writing*. Retrieved from https://plato.algonquincollege.com/applications/guideToGrammar/?page_id=1622

Darling, (2014b). Conjunctions. *Guide to Grammar and Writing*. Retrieved from <https://plato.algonquincollege.com/applications/guideToGrammar/?page.id=i566>

Darling, (2014c). Articles and other determiners. *Guide to Grammar and Writing*. Retrieved from <https://plato.algonquincollege.com/applications/guideToGrammar/?page.id=i62#art>

Microsoft Office Support. (2016, September 7). Create or edit a hyperlink. Retrieved from <https://support.office.com/en-us/article/create-or-edit-a-hyperlink-5d8c0804-f998-4143-86b1-1199735e07bf>

Microsoft Support. (2017, April 26). Use Snipping Tool to capture screenshots. Retrieved from <https://support.microsoft.com/en-ca/help/13776/windows-use-snipping-tool-to-capture-screenshots>

About the Author

Anna Cappuccitti

PART VI

PART 5 EDITING

The final stage of the writing process is managing your readers' impressions by editing your draft from beginning to end. This involves first returning to the start of the writing process and assessing where your document is in relation to the purpose you set out to achieve for it. When you get a sense of how far your document is from achieving that primary purpose, you realize what needs to be done to close that gap—what you need to add, rewrite, delete, and improve. Your next move is a two-step editing process of substantial revisions and proof-editing. The order of these is crucial to avoid wasting time. You wouldn't proofread for minor grammatical errors before substantial revisions because you may end up just altogether deleting paragraphs that you meticulously proofread with a fine-tooth comb.

In this part, we will cover:

- [Substantial Revisions](#)
- [Proofreading for Mechanics](#)

CHARLETTE

Chapter 17: Selecting Appropriate Channels

ANNA CAPPUCCITTI

Learning Objective

1. Distinguish between communication channels to determine which is most appropriate for particular situations.

Throughout this chapter we've been considering messages sent via email because it is the most common channel for written business messages. However, many professionals make the mistake of sending an email when another channel (e.g., a verbal rather than a written one) would be more appropriate for the situation and the audience. If you had to deal with inappropriate behaviour in the workplace, for instance, the right thing to do is discuss it in person with all involved because conflict resolution requires social intelligence informed by all the verbal and

nonverbal information you can offer to and gather from them. You could follow up with an email summarizing a remedial action plan reached through constructive dialogue, but you would never deal with the situation by email alone.



Addressing sensitive situations exclusively by email (or, even worse, text message) tends only to intensify a conflict. Email or messaging can't possibly address the emotional complexity of a toxic situation and usually results in costly delays given the time lag between responses. Tensions also tend to escalate when people have the time to read too much into emails and text or instant messages about sensitive topics, misinterpret their tone, and write angry or passive-aggressive ones in return. (Many people tend to lack filters when writing electronically in a state of heightened emotion because they feel relatively free to express the internal monologue that they would otherwise restrain if in the physical company of the person they're writing to.) Recognizing that email is only one channel on a spectrum of other options, however, and that others

would be more efficient in certain situations, can save plenty of hassle from automatic reliance on one favoured or comfortable channel.

Between traditional and rapid electronic media, we have more choice for communication channels than ever in human history. Each has its own unique advantages and disadvantages that make it appropriate or inappropriate for specific situations. Knowing those pros and cons, summarized in Table 6.1 below for a dozen of the most common verbal and written channels available, is necessary for being an effective communicator in the modern workplace. Choosing channels wisely can mean the difference between a message that is received and understood as intended (the goal of communication), and one that is lost in the noise or misunderstood in costly ways.

Table 6.1: The Spectrum of Common Workplace Communication Channels

Channel: In-person conversation and group meeting

Advantages	Disadvantages	Expectations	Appropriate U
<ul style="list-style-type: none">• The most information-rich channel combining words and nonverbal messages• Dialogue facilitates immediate back-and-forth exchange of ideas• Maintains the human element• Additional participants can join for group discussion	<ul style="list-style-type: none">• Requires that speakers be physically in the same space together• Some people are poor listeners and some are poor speakers• Impermanent unless recording equipment is used	<ul style="list-style-type: none">• Audience must be present and attentive• Use for genuine dialogue• A dynamic speaking ability is required to engage audiences	<ul style="list-style-type: none">• Quick exchange of ideas• Visual communication to complete your work• Add the human element to discussions sensitive to confidential topics

THIS BOOK IS IN PROGRESS FOR FALL 2022

Channel: Email

Advantages	Disadvantages	Expectations	Appropriat
------------	---------------	--------------	------------

- Delivers messages instantly anywhere in the world to anyone with an internet connection
- Sends to one or many people at once, including secondary audiences
- Allows attachments of up to several megabytes and links to internet webpages
- Allows for a back-and-forth thread on the topic
- Archives written correspondence for review even decades later
- Can be done on any mobile device with an internet connection
- Is free (beyond your subscription fees to an internet or phone provider)
- Is somewhat permanent in that emails exist somewhere on
- Gives the illusion of privacy: your messages can be forwarded to anyone, monitored by your company or an outside security agency, retrieved with a warrant, or hacked even if both you and receiver delete them
- Tone may be misread (e.g., jokes misunderstood) due to the absence of nonverbal cues
- May be sent automatically to the recipient's spam folder or otherwise overlooked or deleted without being read
- Subject to errors such as hitting "send" prematurely or replying to all when only the sender should be replied to
- Subject to limits on document attachment size
- Subject to spam
- Reply within 24 hours, or sooner
- Follow conventions for writing
- Polite tone and mindful use
- One topic per message
- Proofread to correct grammar, punctuation, and spelling
- Avoid confusion due to vagueness

Tr
me
eff
co
eff
• De
wo
• U
co
isr
• Se
ele
de
att
• Se
me
m
re

a server even if
deleted by both
sender and
receiver

- (unsolicited emails)
 - Regretted emails can't be taken back or edited
 - Requires a working internet connection on a computing device, which isn't available everywhere in the world
-

THIS BOOK IS IN PROGRESS FOR FALL 2022

Channel: Instant/Text message

Advantages	Disadvantages	Expectations	Appropriate
------------	---------------	--------------	-------------

- Enables the rapid exchange of concise written messages
- Can be done quietly so as to not be overheard
- Inexpensive
- Autocomplete feature helps achieve efficiencies in typing speed and spelling
- Nonverbal characters such as emojis can clarify tone
- Enables team members to stay current on breaking developments
- Often used to avoid human contact
- Acronyms and sms abbreviations may not be understood by all recipients
- Encourages informality with lazy abbreviations, initialisms, and acronyms
- Even typing with thumbs alone can be slower than using 10 fingers on a desktop or laptop computer
- Concise text alone can be misinterpreted for tone when used to summarize complex ideas
- Other nonverbals such as emojis undermine credibility if used in professional situations
- Give the illusion of privacy: texts exist on servers and can be retrieved even
- Respond immediately or as soon as possible
- Be patient if the recipient doesn't respond immediately; they may be busy with real-life tasks
- Proofread when used for professional purposes
- Use only when able; never text when driving
- Use t
exch
short
mess
quic
some
phys
dista
• Get a
infor
exch
(link
video
docu
writi
refer
• Use v
confi
isn't
impo

- if deleted by both sender and receiver
 - Mobility and portability of texting devices tempt users with poor impulse control to text dangerously while walking or driving, or rudely in front of people talking to them
-

Channel: Tweet

Advantages	Disadvantages	Expectations	Appropriateness
<ul style="list-style-type: none"> • Able to reach a large audience of social media users for promotion using hashtags and by developing a following • Able to broadcast real-time updates accessible on smartphones • Able to send and reply to direct messages rapidly • The 280-character limit (140 before 2018) on tweets encourages conciseness • Able to link people to webpages for more information 	<ul style="list-style-type: none"> • The 280-character limit forces concision often leading to confusing initialisms, abbreviations, and word omission 	<ul style="list-style-type: none"> • Strike a balance in posting frequency—not too seldom, not too often • Be concise but also clear and grammatically correct • Maximize potential by using hashtags and links to usher readers towards further information • Focus on company, product, service when tweeting for work purposes 	<ul style="list-style-type: none"> • Broader information in real time a benefit of using social media • Use of social media isn't always appropriate

CHARLETTE

Channel: Instagram

Advantages

Disadvantages

Expectations

Appropriate U

- Instagram for Business provides branding visuals for interested customers, especially millennials and GenZs
- Allows customers to respond in real time
- The audience is largely limited to a younger demographic with limited spending power
- Means of expression is limited to photos and brief captions
- Can undermine professional credibility if used for selfies
- Inconvenient if posting and managing an account from a laptop or desktop computer rather than a smartphone
- Doesn't provide an easy way to link to a company website to provide audiences with further information
- Contributes to a platform seen to be the worst for
- Use for providing visuals of company products or services
- Strike a balance in posting frequency—not too seldom, not too often
- Include as part of a marketing mix that includes other social media such as Facebook and Twitter
- Post co-photos reach younger demographics

mental
health (Royal
Society for
Public
Health, 2017)

Channel: Article, essay, or blog

Advantages	Disadvantages	Expectations	Appropriate U
<ul style="list-style-type: none">• Able to write at length about any topic and reach a potentially large online audience as a blog or article published in an online media outlet• Can allow dialogue if a comments section is enabled	<ul style="list-style-type: none">• Tend to be monologues without the possibility of feedback• People with short attention spans tend to avoid large chunks of text• Some tend to be wary of blogs because they are a genre overpopulated by people's ill-formed opinions	<ul style="list-style-type: none">• Organize with a clear topic thesis and support it with a logical flow of convincing arguments built around credible evidence• Edit and proofread to ensure correctness, conciseness, and reader-friendly flow• Enable comments for feedback and dialogue	<ul style="list-style-type: none">• Articulate thoughts on topics that require length and develop

Channel: Letter

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none">Shows respect through formality and effortEnsures confidentiality when sealed in an envelope and delivered to the recipient's physical address (it is illegal to open someone else's mail)Can introduce other physical documents (enclosures)Can be sent as an attachment	<ul style="list-style-type: none">Slow to arrive at the recipient's address depending on how far away they are from the senderCan be intercepted or tampered with in transit (albeit illegally)Can be overlooked as junk mailTime consuming to print, sign, seal, and send for deliveryMail postage is costlier than email	<ul style="list-style-type: none">Follow formatting conventions (e.g., block for company letters, modified block for personal letters)Use company letterhead template when writing on behalf of your organization	<ul style="list-style-type: none">For providing formal, permanent, confidential written message single important person or organizationIdeal for bad-news messages and matters with possible legal implications (e.g., claims and response letters)For non-urgent matters

Channel: Memo

Advantages	Disadvantages	Expectations	Appropriate U
<ul style="list-style-type: none"> Provides a written record of group decisions, announcements, policies, and procedures within an organization Can also be a format for delivering short/informal reports (e.g., conference report) and recording negotiating terms in agreements between organizations (e.g., memo of understanding) Can be posted on a physical bulletin board and/or emailed 	<ul style="list-style-type: none"> Requires a good archiving system to make memos easily accessible for those (especially new employees) needing to review a record of company policies, procedures, etc. 	<ul style="list-style-type: none"> Use template with company letterhead Follow the same conventions as email, except omit the opening and closing salutations and e-signature 	<ul style="list-style-type: none"> For a v record decision annou policies proced short m shared an org Post a version office h board to all i

Channel: Report / PowerPoint/ Slide
Report

Advantages	Disadvantages	Expectations	Appropriate
<ul style="list-style-type: none">• Allows presentation of a high volume of information presenting research and analysis• Can take various forms such as document booklet or proposal for reading alone or PowerPoint for presenting	<ul style="list-style-type: none">• Time-consuming to write with proper research documentation and visual content, as well as to prepare for (presentations)• Time-consuming for the busy professional to read or an audience to take in• Presentations can bore audiences if not engaging	<ul style="list-style-type: none">• Follow conventions for organizing information according to the size of the report, audience, and purpose• Augment with visuals• Engage audiences with effective oral delivery and visual appeal	<ul style="list-style-type: none">• For pthoro busin intell topic impo an organ opera• For in exten audie• For p audie well- argum (e.g., repor

Channel: Fax

Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Fast delivery of letters and forms • Allows the use of company letterhead 	<ul style="list-style-type: none"> • Limited to 8.5×11" formats • Expensive for the purchase of fax machines and paper rolls that need regular replacing • Possibly expensive if long-distance phone charges apply • Few people use fax and a dwindling number of businesses still use them 	<ul style="list-style-type: none"> • Keep it short • Use only if required in an industry that still favours fax 	<ul style="list-style-type: none"> • For sending forms or work orders in industries that still use fax (e.g., health care)

CHARLETTE

Channel: Phone, VoIP, voicemail, and
conference calls

Advantages

Disadvantages

Expectations

Appropriate

- Enables audio-only dialogue between speakers anywhere in the world
- Quick back-and-forth saves time compared to written dialogue by email or text
- Can send one-way voicemail messages or leave them when the recipient isn't available
- Can be conducted cheaply over the internet (with Voice over Internet Protocol) and easily on smartphones
- Specialized phone equipment and VoIP enable conference calls among multiple users
- Absence of nonverbal visual cues can make dialogue occasionally difficult
- The receiver of a call isn't always available, so the timing must be right on both ends
- Time zone differences complicate the timing of long-distance calls
- Possibly expensive for long-distance calls over a public switched telephone network (PSTN) if VoIP isn't available
- Not always clear how long you have to leave a voicemail message, running the risk of being cut off if your message runs too long
- Recording of conversations is typically unavailable
- Follow conventions for initiating and ending audio-only conversation
- For voicemail, strike a balance between brevity and detail
- Record a professional call-back message for voicemail
- Respond to voicemail as soon as possible
- Be careful with confidential information over the phone and on voicemail
- For w quick dialogo necess between speak physi distan one a
- Conf call w memb team physi prese meeti
- Use V avoid long-charg
- Leave voice messa when receiv aren't availa
- Whe recor conv isn't r
- Whe confic is som impo

THIS BOOK IS IN PROGRESS FOR FALL 2022

unless you
have special
equipment

CHARLETTE

Channel: Video chat and web conference

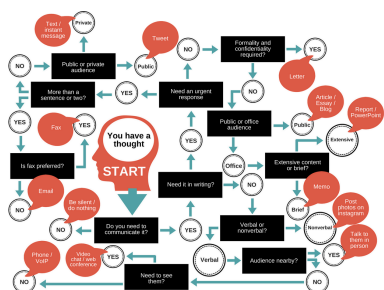
Advantages	Disadvantages	Expectations	Appropriate Use
<ul style="list-style-type: none"> • Enables face-to-face one-on-one or group meetings for people physically distant from one another • Allows participants to see nonverbals that would be unseen in a phone conference meeting • Can be integrated into a real in-person meeting to include those physically absent • Inexpensive with common applications such as Skype, FaceTime (for Apple devices), and Google Talk • Cheaper than flying people to meetings 	<ul style="list-style-type: none"> • Connection problems often result in poor audio quality (cutting in and out) and participants talking over one another • Enterprise applications improve functionality but for a cost 	<ul style="list-style-type: none"> • Requires a high-speed internet connection, microphone, and webcam • Requires that participants be as present and presentable (at least from the waist-up) as they would be for an in-person meeting • Participants must control their background surroundings, especially when web conferencing from home, to avoid interruptions 	<ul style="list-style-type: none"> • For when in-person meeting is necessary but participants are in different physical locations • Often used for job interviews when participants cannot conveniently attend in person

Choosing the correct communication channel on the spectrum of options using the criteria above involves a decision-making process based on the purposes of the communication, as discussed earlier in this chapter. Factors to consider include convenience for both the sender and receiver, timeliness, and cost in terms of both time and money. When choosing to send an email, for instance, you:

1. Begin with the thought you need to communicate
2. Decide that it must be in writing for future reference rather than spoken
3. Consider that it would be more convenient if it arrived cheaply the instant you finished writing it and hit Send
4. Want to give the recipient the opportunity to respond quickly or at least within the 24-hour norm
5. Decide that it would be better to send your message by email rather than by other electronic channels such as text, instant message (because you have more to say than would fit in either of those formats), or fax because you know the recipient prefers email over fax, as do most people and all but a few professional fields.

All of these decisions may occur to you in the span of a second or so because they are largely habitual. Figure 6.1 charts out that decision-making process for selecting the most appropriate channel among the 12 given in Table 6.1 above.

Figure 6.1: Channel Selection Process Flow Chart



[Click here for an interactive and accessible version of the Channel Selection Flow Chart](#)

We will examine the uses, misuses, conventions, and implications of these channels in the chapters ahead. For now, however, let's appreciate that choosing the right channel at the outset of the writing process saves time—the time that you would otherwise spend correcting communication errors and doing damage control for having chosen the wrong one for the situation at hand. If you find yourself forced to meet someone in person to deal with the damage wrought by a toxic email exchange before moving forward, just think how you would be into the next steps if you had skipped the email war and met in person to deal with the situation like adults in the first place.

Key Takeaway

Choose the most appropriate communication channel for the occasion by taking into account the full spectrum of traditional and electronic means, as well as your own and your audience's needs.

Exercises

Identify the most appropriate communication channel for each situation and explain your reasoning.

1. You come up with a new procedure that makes a routine task in your role in a retail store quicker and easier; the District Manager now wants you to share it with the other employees in your role in the entire district.
2. You are working with two other students on a research report. Both have been bad lately about submitting their work on time, and you're starting to worry about meeting the next major milestone a few days from now.
3. You are about to close a big sale but need quick authorization from your manager across town about a certain discount you would like to apply. You need it in writing just in case your manager forgets about the authorization.
4. You were under contract for services to develop social media content for a company. Near the end of the job, you discovered that the company was dissolved, but you haven't yet been paid for services rendered. You want to formally inform the company of the charges and remind them of their contractual obligations; in doing so you want to lay down a paper trail in case you need to take the company to court for breach of contract.

Reference

Royal Society for Public Health. (2017, May 19). *Instagram ranked worst for young people's mental health*. Retrieved from

<https://www.rsph.org.uk/about-us/news/instagram-ranked-worst-for-young-people-s-mental-health.html>

About the Author

Anna Cappuccitti

Chapter 19: Proofreading for Mechanics/Eli Review

ANNA CAPPUCCITTI

Learning Objective

1. Proofread documents for spelling, formatting, grammar, clarity, wordiness and incorrect use of words.

The very last target for proofreading as you finalize your draft for submission is mechanics. In English writing, **mechanics** relates to typographic style such as the choice between UPPERCASE and lowercase letters, *italics* or **boldface** type and plain style, as well as using figures (e.g., 1, 2, 3) or written out numbers (e.g., one, two, three). Professionals follow stylistic conventions for mechanics much like they do punctuation rules. If you don't know these conventions, making them up as you go along may produce unprofessional-looking documents. Remember

that consistency throughout your document is the rule. Consider the following as your guide for how to get your writing mechanics right.

Capitalizing

One of the worst mistakes you can make in a high-priority document like a cover letter is a glaring capitalization error such as not capitalizing the first letter in a sentence or writing “im” or “ive” instead of “I am” or “I have.” These errors are fine when texting your friends. To a hiring manager, however, the red flags they raise concerning the literacy, work ethic, and even maturity of the applicant might land that application in the shredder. At the other typographic extreme, those who use all-caps for anything other than abbreviations, as in “SEND ME THAT REPORT RIGHT NOW,” look emotionally unstable. In normal writing, we use conventional combinations of capitals and lowercase letters meaningfully to guide our readers through our sentences. Let’s take a closer look at when to capitalize and when not to capitalize letters.

What to Capitalize

You can’t go wrong if you capitalize in the following situations:

- First letter of the first word of a:
 - Sentence; e.g. These pretzels are making me thirsty.
 - Full-sentence quotation even if it appears

after a signal phrase; e.g., A great American humourist put it best when he said, “Travel is fatal to prejudice, bigotry, and narrow-mindedness” ([Twain, 1869, p. 333](#)).

- Rule following a colon in a sentence; e.g.,
My mother taught me the golden rule:
Treat others the way you’d like to be
treated yourself
- Point in a bullet-point or numbered list
regardless of whether it’s a full sentence
or just a noun phrase, as in this list
- The first-person personal pronoun “I”
- Major words in **titles**, including the first letter of the first word no matter what it is, nouns, pronouns, verbs, adjectives, and adverbs, but not short prepositions such as *in*, *of*, *on*, or *to*, *nor* coordinating conjunctions such as *and*, *but*, *for*, or *so*, unless they’re the first word (see [Table 16.2](#) below for several example titles)
- The first letter of proper nouns, which include the types given below in Table 5.5.1

Table 16.1: Proper Nouns

Proper Noun Type	Examples
People and professional roles or familial relations preceding the name	Prime Minister Justin Trudeau, Roberta Bondar, Professor Patrick Grant, Mayor Humdinger, Ludwig van Beethoven, Aunt Pam, God, Buddha
Adjectives derived from names	Shakespearean sonnet, Freudian slip
Major buildings and infrastructure	CN Tower, the Queensway, the Hoover Dam
Specific geographical locations and regions	Ottawa, British Columbia, the Canadian Rockies, Lake Ontario, the West Coast, Eastern Canada, the Maritimes, South Asia, the Netherlands
Celestial bodies	Venus, Earth, Mars, the Sun, the Kuiper Belt, the Milky Way, the Virgo Supercluster
Books, films, etc. (see Table 5.5.2.1 below)	Beautiful Losers, Star Wars, The Onion, Overwatch, the Ottawa Citizen
Days of the week, months, holidays	Monday, November, Labour Day, Groundhog Day, Ramadan, Hanukkah, Fall 2019 semester
Historical events and periods	the Battle of Vimy Ridge, the Cold War, the Renaissance, the Old Kingdom, Anthropocene, the Big Bang
Ethnicities, nationalities, religions, and languages	Anishinaabe, Australian, English, Russian, Malaysian, Catholic, Islam, Sunni Muslim, Swedish, Swahili
Institutions, political and cultural groups	Algonquin College, University of Toronto, the Supreme Court, New Democrats, Montreal Canadiens, Oscar Peterson Trio
Academic courses, programs, departments, and some degrees	Statistics 101, Communications I, Game Development Advanced Diploma Program, School of Business, PhD, MBA
Numbered or lettered items	Flight AC2403, Gate 11, Invoice No. 3492B, Serial No. D8834-2946-1212, Rural Road 34, Figure 8, Volume 2, Part 4, Model 3

Brand names, corporations, and stores	Microsoft Word, Samsung Galaxy, Tesla, Apple, Google, GlaxoSmithKline, Mountain Equipment Co-op
---------------------------------------------	-------------------------------------------------------------------------------------------------------

What Not to Capitalize

Don't capitalize the following:

- Directions if they're not in a geographical name; e.g., We drove **east** to North Bay, Ontario, from the Pacific Northwest
- Professional roles on their own without a name following (e.g. the prime minister) or if they follow the person's name; e.g., Patrick Grant, professor of English
- Celestial bodies when used outside of the context of celestial bodies; e.g., He's really down to earth. I love you to the moon and back. Here comes the sun.
- The seasons, despite the fact that the days of the week and months are capitalized (e.g., We're heading south for the winter.) unless they're part of a title (e.g., Fall 2019 semester)
- Century numbers; e.g., the nineteenth century
- Words that came from names or geographical regions; e.g., pasteurize, french fries, italics, roman numerals, arabic numerals
- Fields of study; e.g., history, biology, physics, economics, dentistry
- Some academic degrees; e.g., master's degree, bachelor's degree
- Citations at the page and line level: page 6, lines 23-27; p. 24, ll. 12-14

What to Look for When Proofreading

Pay close attention to the beginning of sentences, each point in a list, titles, and proper nouns. Determine whether you should capitalize or leave letters lowercase depending on the conventions given above.

Incorrect: let's go South to visit the President and stay with vice president Frito.

The fix: Let's go south to visit the president and stay with Vice President Frito.

The fix: Let's go south to visit President Comacho and stay with Frito, his vice president.

In the drafting process, you might delete the original capitalized opening to a sentence while trying out another style of sentence and forget to capitalize the new beginning. The proofreading stage is when you can catch glaring errors such as this. Also, the convention for geography is to capitalize directions only if they're part of place names but not when they're mere compass directions. Finally, capitalize professional titles only when they precede a name.

Incorrect: In addition, im proficient in the use of Microsoft office, such as Powerpoint.

The fix: In addition, I am proficient in the use of Microsoft Office, such as PowerPoint.

Texting habits might die hard. A crucial step in professionalizing yourself, however, is to correct informal spellings such as im so that they are the more correct I'm or more formal I am, especially in job application documents. Also, be especially careful with capitalization around proprietary names such as software, which may include internal capitalization as we see in PowerPoint or YouTube.

Incorrect: I had to read the textbook Communication At Work for my Algonquin college communications course in the accounting program.

The fix: I had to read the textbook Communication at Work for my Algonquin College Communications course in the Accounting program.

The titling convention is to capitalize major words but not short prepositions such as at. Since academic courses, institutions, and programs are proper nouns like the names of people, capitalize them all.

Abbreviations

Fully spell out abbreviations the first time you mention them and put the abbreviation in parentheses. For example, if you were to say, “The Public Health Agency of Canada (PHAC) is reporting an above-average number of flue deaths this year,” subsequent mentions of the Agency can appear as simply “PHAC.” Institutions that are so common as names (proper nouns) in their abbreviated form (e.g., CBC, which stands for the “Canadian Broadcasting Corporation”) can be given as abbreviations unless introduced to an audience that wouldn’t know them. As you can see here, avoid adding periods after each uppercase letter in an abbreviation.

For more on capitalization, see the following resources:

- The [Guide to Grammar & Writing’s Capitalization page](#) and [Capitalization I](#) and [Capitalization II](#) digital-activity exercises linked at the bottom (Darling, 2014a)
- The [Guide to Grammar & Writing’s Abbreviations page](#) and *Guide to Grammar &*

Writing's [Abbreviations I](#) digital-activity exercise linked at the bottom (Darling, 2014b)

- [Purdue OWL's A Little Help with Capitals page](#) (Berry & Brizee, 2013)
- [The Grammar Book's Capitalization Rules page](#) (Straus, 2014)

Italicizing, Underlining, and Bolding

The standard typeface options of *italics*, **bold**, and underline allow writers to draw attention to their text in varying degrees. Each has its advantages and disadvantages. The biggest disadvantage comes from overuse, which diminishes their impact. Taking advantage of their ability to draw the reader's eye and communicate information beyond the words they express requires following certain conventional uses for each. We'll start with the most meaningful in terms of the information it can convey.

As the typeface option that slants the top of each letter to the right, **italic typeface** performs several possible functions related to emphasizing words. Italics can also resolve ambiguities that would cause confusion without it. Use italics for the following purposes:

- **Emphasis:** Use italics sparingly to emphasize particular words or phrases; e.g., "I've asked them no less than *three times* to send the reimbursement cheque." If we were saying this aloud, you would raise your volume and slow down your enunciation to emphasize "*three times*." Italicizing is more mature and professionally appropriate

than using all-caps to emphasize words.

- **Words under Discussion:** Italicize a word, phrase, or even a full sentence when discussing it. For instance, you see throughout this textbook example words italicized, such as just above §5.5.I.I.
- **Foreign Words and Phrases:** Italicize foreign words that have not yet become part of the English vernacular. For instance, italicize the binomial Latin name of a species (e.g., *branta canadensis* for Canada goose) or the French phrase *déjà vu* but not the more familiar borrowed French words “bourgeois,” “brunette,” “chauffeur,” “cliché,” “depot,” “entrepreneur,” “résumé,” or “souvenir.” If the foreign word is in most English dictionaries, it is probably safe to write it in plain style rather than italics.
- **Titles:** Use italics when referring to the title of a longer work such as a book, film, or newspaper. See [Table 16.2](#) below for a full list of the types of works you would italicize, as opposed to shorter works (or titled sections within longer works) you would put in quotation marks without italics.

Table 16.2: *Italicized Titles*

Type of Work	Examples
Book, legislation	<i>Elements of Style</i> , <i>A Brief History of Time</i> , <i>The Handmaid's Tale</i> , <i>The Great Gatsby</i> , <i>The Copyright Act</i>
Magazine	<i>Maclean's</i> , <i>The Walrus</i> , <i>Chatelaine</i> , <i>MoneySense</i> , <i>Canadian Business</i> , <i>The Hockey News</i> , <i>Today's Parent</i> , <i>Flare</i>
Newspaper	<i>The Globe and Mail</i> , <i>the Toronto Star</i> , <i>National Post</i> , <i>Montreal Gazette</i> , <i>Ottawa Citizen</i> , <i>Time Colonist</i>
Website (APA)	<i>YouTube</i> , <i>Wikipedia</i> , <i>Facebook</i> , <i>Instagram</i> , <i>The Onion</i>
Film	<i>Casablanca</i> , <i>Thirty Two Short Films About Glenn Gould</i>
TV show	<i>Dragons' Den</i> , <i>Hockey Night in Canada</i> , <i>Orphan Black</i>
Play, long poem	<i>The Rez Sisters</i> , <i>Romeo & Juliet</i> , <i>Waiting for Godot</i> , <i>Paradise Lost</i>
Album, opera	<i>Drake's Views</i> , <i>Arcade Fire's Funeral</i> , <i>Alanis Morissette's Jagged Little Pill</i> , <i>Mozart's The Magic Flute</i>
Works of art	<i>Mona Lisa</i> , <i>The School of Athens</i> , <i>The Starry Night</i> , <i>Voice of Fire</i>
Video game	<i>Tetris</i> , <i>Grand Theft Auto V</i> , <i>Super Mario Bros.</i> , <i>Minecraft</i>
Ships, airplanes	<i>the Titanic</i> , <i>Bismarck</i> , <i>Hindenburg</i> , <i>Enola Gay</i>
Legal cases	<i>Roe v. Wade</i> , <i>Brown v. Board of Education</i> , <i>Baker v. Canada</i>

When words are already italicized, such as a sentence under discussion or a book title within a book title, then de-italicize the title back into plain style (e.g., *Vision in Shakespeare's King Lear*). Exceptions to the rule of italicizing books are holy texts such as the Bible and

Koran, though specific editions should be italicized (e.g., *The New American Standard Bible*).

Underlining is normally an old-fashioned alternative to italicizing because it identified titles written on typewriters before modern word processors made italicization feasible. Today, underlining is mainly used to emphasize words within italicized titles or as an alternative to boldface type.

More than any other typeface, **bold** is best at emphasizing words because it draws the reader's eyes more effectively than italics or underlining, especially for document titles and section headings. In casual emails, you can also use it to highlight a main action point that's surrounded by plain-style text to ensure that the reader doesn't miss it. Avoid bolding, underlining, italicizing, and using all-caps in combination merely to lend added emphasis to words. Use whichever one is most appropriate in context.

For more on italics, underlining, and bolding, see the following resources:

- Your Dictionary's [When to Italicize](#) (2009)
- WikiHow's [How to Use Italics](#) (Morgan, 2015)
- Butterick's Practical Typography's [Bold or Italic](#) (Butterick, 2013)

Numbering

When do you spell out a number (e.g., *ten*) and when do you use a figure (e.g., *10*)? What are the conventions for academic and professional situations? It depends on your purposes, but in routine formal situations and in APA style, spell out numbers from one to ten and use figures

CHARLETTE

for π and up. In informal and technical writing, however, using only figures ensures accuracy, consistency, and brevity.

Table 16.3: Formal Numbering
Conventions

Convention	Examples (Note: Bold would not be used in the text. It is used here for illustrations purposes only)
Words	only one person, ten reasons
Figures	11 people, 40 cars, 127 hours, 330 lbs. \$39.99 , 6.12 litres, 68,000 voters, 186,282.397 miles per second.
Large round	a hundred people, a thousand times, six billion dollars, \$6 billion , \$6,300,000 , \$6.3 million , \$2.345 trillion , You have a hundred trillion microbes in your body.
Fractions	over two thirds of respondents, 4 millionths of a second, a one-fifth share of the profit, $\frac{3}{32}$ allen key, 1 and $\frac{21}{64}$ inches
Percentages and decimals	8 percent increase (<i>in formal docs</i>), 8% increase (<i>in business forms and technical docs</i>), 9.57 seconds, .045cm , 0.12g
Beginning of sentences	Twenty-six percent of respondents agreed while 71% disagreed.
Days, years	July 1, 1867 ; from the 1st of July to the 4th ; AD 1492 ; from 2000 to 2018 ; in the 2010-2011 season; the nineties , 1990s , '90s
Times	8am , noon , 1:15pm , 5-6pm , 10:30-11am , 11:30am-1pm (or ...PM)
Addresses	One First Street , 2 Second Street , 16 Tenth Avenue , 251 11th Avenue W , 623 East 125th Street
Telephone	613-555-4450 ext. 9832 , 250-555-7204 , (416) 555-1185
Identification	Room 6 , Channel 4 , Hwy. 416 , Elizabeth II , Henry V
Weights and measures	Andre weighed over 200 lbs. by age 12 and over 500 lbs. by 40 . The room is 10' by 12' in a 2,400 sq. ft. house., 8 metres (<i>in formal docs</i>), 24km (<i>in informal and technical docs</i>)

Ages	<p>Little Nicky was 3 years and 7 months when his family moved.</p> <p>By the time she was thirty-six, Miranda had accomplished plenty.</p> <p>Miranda, 36, has accomplished plenty.</p>
Pages	<p>page 24 / (p. 24), pages 67-68 / (pp. 67-68), (pp. 114-118), chapter 11 / (ch. 11), chapters 11-12 (chs. 11-12)</p>
Commercial and legal	<p>The stated amount of \$1,200 will be paid no less than two (2) weeks after the completion of the contact work.</p>
Related (all under 10)	<p>We bought six shirts, eight pairs of pants, and four jackets.</p>
Related (any 10+)	<p>We bought 9 apples, 18 bananas, and 6 pineapples.</p>
Consecutive	<p>They ordered twelve 90-lb. weights. We observed twenty-five 500-megaton explosions. I manufactured 14,032 6709T parts for Dynamo, Inc. <i>(When two numbers appear consecutively, generally write out the number for the first and use a figure for the second, but use a figure for the first if it would take more than one or two words to write it out.)</i></p>

What to Look for When Proofreading

Determine whether you should replace your spelled-out numbers with figures or vice versa according to the conventions given above.

Incorrect: Only 2 people showed up.

The fix: Only two people showed up.

In formal writing, spell out one- or two-word numbers rather than use figures lazily. However, feel free to use figures, no matter how small the number, in informal writing where concision matters most.

Incorrect: She was charged nine-hundred-and-thirty-six dollars and ninety-eight cents for the repair.

The fix: She was charged \$936.98 for the repair.

Incorrect: The chances of life existing on other planets are quite high if there are, by extrapolation, roughly 19,000,000,000,000,000,000,000 star systems with earth-like planets in the universe ([Frost, 2017](#)).

The fix: The chances of life existing on other planets are quite high if there are, by extrapolation, roughly **19 billion trillion** star systems with earth-like planets in the universe ([Frost, 2017](#)).

Incorrect: 23,000 units were sold in the first quarter.

Incorrect: Twenty-three thousand units were sold in the first quarter.

The fix: In the first quarter, **23,000** units were sold.

Though you should use a figure to represent a number above ten and spell out a number appearing at the beginning of a sentence, re-word the sentence if that number is more than two words.

Incorrect: We've moved the meeting to 05/04/18.

The fix: We've moved the meeting **from Tuesday, April 2, to Friday, April 5, 2018**.

Though the above correction sacrifices brevity, the gains in clarity can potentially prevent expensive miscommunication. The correction prevents the message recipients from misinterpreting the new meeting date as being May 4th and helps them pinpoint which date in their calendars to click and drag the original meeting from. Providing the days of the week also helps the recipients determine at a glance whether the new date conflicts with regularly scheduled weekly appointments.

Incorrect: Let's meet at number ninety, 6th Avenue, at fourteen o'clock.

The fix: Let's meet at **90 Sixth Avenue at 2 p.m.**

Though "ninety" would be correct in some contexts (MLA style) because it is a one-word number, APA

address conventions require you to use figures for address numbers and to spell out numerical street/avenue numbers from first to tenth, then to use figures from *11th* onward. Also, the English convention for representing time of day is to use the twelve-hour clock, whereas the French convention is to use the twenty-four-hour clock.

Incorrect: Will you still need me, will you still feed me when I'm **64**?

The fix: Will you still need me, will you still feed me when I'm **sixty-four**?

Unless the age follows a person's name as an appositive (e.g., Paul, 64, is losing his hair) or is part of a series that identifies several ages (e.g. a program for those of 4 to 6 years of age, with some 7-year-olds) or combines one person's age in years and months, spell out ages up to one hundred.

Incorrect: The one expedition catalogued **thirty-four** new types of spiders, 662 new types of beetles, and 178 new types of ants.

The fix: The one expedition catalogued **34** new types of spiders, 662 new types of beetles, and 178 new types of ants.

Though normally you would spell out two-word numbers, maintaining consistency with the related numbers in the series, which are figures here because they are over ten, takes precedence.

Incorrect: The program has **2** streams, one for the 4-year-olds and another for the 5-year-olds.

The fix: The program has **two** streams, one for the 4-year-olds and another for the 5-year-olds.

This looks at first as if all three of these are related numbers in a series and therefore must all be figures. The related-numbers convention applies to only the last two

numbers (ages), however, whereas the first number is not an age, hence not part of the series. Since the first number can be spelled out as one word, two, it is not given as a figure.

Incorrect: If your gym orders more than 20 100-lb. weights, you'll get every additional unit for half price.

The fix: If your gym orders more than **twenty** 100-lb. weights, you'll get every additional unit for half price.

To avoid "20 100-lb." being misread as "20100-lb.," bend the rule about using figures for numbers above ten to spell out the first of the consecutive numbers and use a figure for the second since it's a weight. (If the first number were more than two words spelled out and the weight only one, however, "150 thirty-pound weights" would be preferable.)

For more on numbers, see the following resources:

- Purdue OWL's [Writing Numbers](#) (Berry, 2018)
- APA Style's [Comparing MLA and APA: Numbers](#) (Becker, 2014)

Key Takeaway

At the end of the editing stage, proofread for mechanical errors involving capitalization, typographic style (e.g., italics), and numbers.

Exercise

1. Go to Eli Review and begin to review your assigned peer.

References

- Becker, D. (2014, June 26). Comparing MLA and APA: Numbers. *APA Style*. Retrieved from <http://blog.apastyle.org/apastyle/2014/06/comparing-mla-and-apa-numbers.html>
- Berry, C. (2018, February 7). Writing numbers. *Purdue OWL*. Retrieved from <https://owl.english.purdue.edu/owl/resource/593/01/>
- Berry, C., & Brizee, A. (2013, July 12). A little help with capitals. *Purdue OWL*. Retrieved from <https://owl.english.purdue.edu/owl/resource/592/01/>
- Butterick, M. (2013, July 24). Bold or italic. *Butterick's Practical Typography*. Retrieved from <https://practicaltypography.com/bold-or-italic.html>
- Darling, C. (2014a). Capitalization. *Guide to Grammar & Writing*. Retrieved from https://plato.algonquincollege.com/applications/guideToGrammar/?page_id=4513
- Darling, C. (2014b). Abbreviations. *Guide to Grammar & Writing*. Retrieved from https://plato.algonquincollege.com/applications/guideToGrammar/?page_id=4498
- Frost, R. (2017, November 15). The number of Earth-like planets in the universe is staggering – here's the math. *Forbes*. Retrieved from <https://www.forbes.com/sites/quora/2017/11/15/the-number-of-earth-like-planets-in-the-universe-is-staggering-heres-the-math/#5db6267f4932>
- Morgan, M. (2015, May 23). How to use italics. *WikiHow*. Retrieved from <https://www.wikihow.com/Use-Italics>
- Straus, J. (2015, June 5). Capitalization rules. *The Grammar Book*. Retrieved from <https://www.grammarbook.com/punctuation/capital.asp>

Twain, M. (1889). *The innocents abroad, or The new pilgrims' progress*. Vol. II. Leipzig: Bernhard Tauchnitz. Retrieved from <https://play.google.com/store/books/details?id=f4EwNleAjAC&rdid=book-f4EwNleAjAC&rdot=1>

Your Dictionary. (2009, September 3). When to italicize. Retrieved from <http://grammar.yourdictionary.com/punctuation/when/when-to-italicize.html>

About the Author

Anna Cappuccitti

PART VII

PART 6 – IT YOUR TURN

Think about your final paper like a recipe. All that is left is to re-read the paper to make sure you are correctly using APA style in the paper and APA style with references. Modify changes utilizing your peer review and my suggestions. Add in your revisions from your Eli Review revisions. Look over the paper and make sure that it is “your best effort”. You have put a lot of time and effort into this document to take it lightly. Let’s get on so we can “get to partying”.

- Describe what happens to apparel products after they are purchased
- Define the concepts of use, care, and storage of apparel products
- Explain the difference between satisfaction and dissatisfaction
- Compare and Contrast the consumer spending

in the United States to another country

Identify the reasons why and how consumers dispose of apparel products

The final paper is due @ 10:00 PM. At this point, you are more than halfway through the final paper. We have been scaffolding this assignment all semester:

1. You created a draft paper
2. You had a peer reviewer and I assess your paper and wrote on how to enhance the paper
3. In addition, there was also a revision in which you had the ability to rank your peer reviews to consider for your final paper.
4. You should have data from various databases or Euromonitor – passport
5. Lastly, you created your rewrite from your peer reviews in Eli Review Revision – Your Rewrite and took lead from Peer Review – which is worth 20 points- This section of the paper can be copied from your Eli revision. This was your last assignment in Eli Review

In this part – we can review examples of various final papers, and rubrics and be happy

This is where you can add appendices or other back matter.