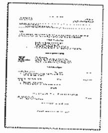
## EXERCISES

*For more about memos, see Ch. 14, p. 376.*

1. Form small groups and study the home page of your college or university's website. Focus on three measures of excellence in technical communication: clarity, accessibility, and professional appearance. How effectively does the home page meet each of these measures of excellence? Be prepared to share your findings with the class.
2. Locate an owner's manual for a consumer product, such as a coffee maker, bicycle, or hair dryer. In a memo to your instructor, discuss at least three decisions the writers and designers of the manual appear to have made to address audience-related factors, purpose-related factors, setting-related factors, document-related factors, or process-related factors. For instance, if the manual is printed only in English, the writers and designers presumably decided either that it was not necessary to create versions in other languages or that they didn't have the resources to do so.
3. Using a job site such as Indeed.com or Monster.com, locate three job ads for people in your academic major. In each ad, identify references to writing and communication skills, and then identify references to professional attitudes and work habits. Be prepared to share your findings with the class.

## e CASE 1: Using the Measures of Excellence in Evaluating a Résumé



Your technical-communication instructor is planning to invite guest speakers to deliver presentations to the class on various topics throughout the semester, and she has asked you to work with one of them to tailor his job-application presentation to the "Measures of Excellence" discussed in this chapter. To access relevant documents and get started on your project, go to LaunchPad.

# CHAPTER 2 Understanding Ethical and Legal Considerations

**ETHICAL AND LEGAL ISSUES** are all around you in your work life. If you look at the website of any bike manufacturer, for example, you will see that bicyclists are always shown wearing helmets. Is this because bike manufacturers care about safety? Certainly. But bike makers also care about product liability. If a company website showed cyclists without helmets, an injured cyclist might sue, claiming that the company was suggesting it is safe to ride without a helmet.

Ethical and legal pitfalls lurk in the words and graphics of many kinds of formal documents. In producing a proposal, you might be tempted to exaggerate or lie about your organization's past accomplishments, pad the résumés of the project personnel, list as project personnel some workers who will not be contributing to the project, or present an unrealistically short work schedule. In drafting product information, you might feel pressured to exaggerate the quality of the products shown in catalogs or manuals or to downplay the hazards of using those products. In creating graphics, you might be asked to hide an item's weaknesses by manipulating a photo of a product.

One thing is certain: there are many serious ethical and legal issues related to technical communication, and all professionals need a basic understanding of them. Keep in mind that decisions and actions can be legal but not ethical, or vice versa. You will need to think carefully about both aspects of any technical communication you create and address any conflicts that arise.





## A Brief Introduction to Ethics

Ethics is the study of the principles of conduct that apply to an individual or a group. For some people, ethics is a matter of intuition—what their gut feelings tell them about the rightness or wrongness of an act. Others see ethics in terms of their own religion or the Golden Rule: treat others as you would like them to treat you. Ethicist Manuel G. Velasquez outlines four moral standards that are useful in thinking about ethical dilemmas (2011):

- **Rights.** This standard concerns individuals' basic needs and welfare. Everyone agrees, for example, that people have a right to a reasonably safe workplace. When we buy a product, we have a right to expect that the information that accompanies it is honest and clear. However, not everything that is desirable is necessarily a right. For example, in some countries, high-quality health care is considered a right. That is, the government is required to provide it, regardless of whether a person can afford to pay for it. In other countries, health care is not considered a right.
- **Justice.** This standard concerns how the costs and benefits of an action or a policy are distributed among a group. For example, the cost of maintaining a high-speed broadband infrastructure should be borne, in part, by people who use it. However, because everyone benefits from the infrastructure, the standard of justice suggests that general funds can also be used to pay for it. Another example: justice requires that people doing the same job receive the same pay, regardless of whether they are male or female, black or white.
- **Utility.** This standard concerns the positive and negative effects that an action or a policy has, will have, or might have on others. For example, if a company is considering closing a plant, the company's leaders should consider not only the money they would save but also the financial hardship of laid-off workers and the economic effects on the community. One tricky issue in thinking about utility is figuring out the time frame to examine. An action such as laying off employees can have one effect in the short run—improving the company's quarterly balance sheet—and a very different effect in the long run—hurting the company's productivity or the quality of its products.
- **Care.** This standard concerns the relationships we have with other individuals. We owe care and consideration to all people, but we have greater responsibilities to people in our families, our workplaces, and our communities. The closer a person is to us, the greater care we owe that person. Therefore, we have greater obligations to members of our family than we do to others in our community.

Although these standards provide a vocabulary for thinking about how to resolve ethical conflicts, they are imprecise and often conflict with each other. Therefore, they cannot provide a systematic method of resolving ethical conflicts. Take the case of a job opportunity in your company. You are a member of the committee that will recommend which of six applicants to hire to redesign a customer portal that hosts tutorials and documentation. One of the six is a friend of yours who has been unable to secure a professional job since graduating from college two years ago. She therefore does not have as much website design experience as the other five candidates. However, she is enthusiastic about gaining experience in this particular field—and eager to start paying off her student loans.

How can the four standards help you think through the situation? According to the *rights* standard, lobbying for your friend or against the other applicants would be wrong because all applicants have an ethical right to an evaluation process that considers only their qualifications to do the job. Looking at the situation from the perspective of *justice* yields the same conclusion: it would be wrong to favor your friend. From the perspective of *utility*, lobbying for your friend would probably not be in the best interests of the organization, although it might be in your friend's best interests. Only according to the *care* standard does lobbying for your friend seem reasonable.

As you think about this case, you have to consider a related question: should you tell the other people on the hiring committee that one of the applicants is your friend? Yes, because they have a right to know about your personal relationship so that they can better evaluate your contributions to the discussion. You might also offer to *recuse* yourself (that is, not participate in the discussion of this position), leaving it to the other committee members to decide whether your friendship with a candidate represents a conflict of interest.

One more complication in thinking about this case: Let's say your friend is one of the top two candidates for the job. In your committee, which is made up of seven members, three vote for your friend, but four vote for the other candidate, who already has a very good job. She is a young, highly skilled employee with a degree from a prestigious university. In other words, she is likely to be very successful in the working world, regardless of whether she is offered this particular job. Should the fact that your friend has yet to start her own career affect your thinking about this problem? Some people would say no: the job should be offered to the most qualified applicant. Others would say yes: society does not adequately provide for its less-fortunate members, and because your friend needs the job more and is almost as qualified as the other top applicant, she should get the offer. In other words, some people would focus on the narrow, technical question of determining the best candidate for the job, whereas others would see a much broader social question involving human rights.

Most people do not explore the conflict among rights, justice, utility, and care when they confront a serious ethical dilemma; instead, they simply do what they think is right. Perhaps this is good news. However, the depth of ethical thinking varies dramatically from one person to another, and the consequences of superficial ethical thinking can be profound. For these reasons, ethicists have described a general set of principles that can help people organize their thinking about the role of ethics within an organizational context. These principles form a web of rights and obligations that connect an employee, an organization, and the world in which the organization is situated.



For example, in exchange for their labor, employees enjoy three basic rights: fair wages, safe and healthy working conditions, and due process in the handling of such matters as promotions, salary increases, and firing. Although there is still serious debate about the details of employee rights, such as whether employees have the right to freedom from surreptitious surveillance and unreasonable searches in drug investigations, the debate almost always concerns the extent of employees' rights, not the existence of the basic rights themselves. For instance, ethicists disagree about whether hiring undercover investigators to identify drug users at a job site is an unwarranted intrusion on employees' rights, but there is no debate about employees' right to freedom from unwarranted intrusion.

## Your Ethical Obligations

In addition to enjoying rights, an employee assumes obligations, which can form a clear and reasonable framework for discussing the ethics of technical communication. The following discussion outlines three sets of obligations that you have as an employee: to your employer, to the public, and to the environment.

### OBLIGATIONS TO YOUR EMPLOYER

You are hired to further your employer's legitimate aims and to refrain from any activities that run counter to those aims. Specifically, you have five obligations:

- **Competence and diligence.** *Competence* refers to your skills; you should have the training and experience to do the job adequately. *Diligence* simply means working hard. Unfortunately, a recent survey of over 1,000 workers revealed that more than half of employees waste up to one hour of their eight-hour day surfing the web, socializing with co-workers, and doing other tasks unrelated to their jobs (Salary.com, 2013).
- **Generosity.** Although *generosity* might sound like an unusual obligation, you are obligated to help your co-workers and stakeholders outside your organization by sharing your knowledge and expertise. What this means is that if you are asked to respond to appropriate questions or provide recommendations on some aspect of your organization's work, you should do so. If a customer or supplier contacts you, make the time to respond helpfully. Generosity shows professionalism and furthers your organization's goals.
- **Honesty and candor.** You should not steal from your employer. Stealing includes such practices as embezzlement, "borrowing" office supplies, and

padding expense accounts. *Candor* means truthfulness; you should report to your employer problems that might threaten the quality or safety of the organization's product or service.

Issues of honesty and candor include what Sigma Xi, the Scientific Research Society, calls trimming, cooking, and forging (Sigma Xi, 2000, p. 11). *Trimming* is the smoothing of irregularities to make research data look extremely accurate and precise. *Cooking* is retaining only those results that fit the theory and discarding the others. And *forging* is inventing some or all of the data or even reporting experiments that were never performed. In carrying out research, employees must resist any pressure to report only positive findings.

- **Confidentiality.** You should not divulge company business outside of the company. If a competitor finds out that your company is planning to introduce a new product, it might introduce its own version of that product, robbing your company of its competitive advantage. Many other kinds of privileged information—such as information on quality-control problems, personnel matters, relocation or expansion plans, and financial restructuring—also could be used against the company. A well-known confidentiality problem involves *insider information*: an employee who knows about a development that will increase (or decrease) the value of the company's stock, for example, buys (or sells) the stock before the information is made public, thus unfairly—and illegally—reaping a profit (or avoiding a loss).
- **Loyalty.** You should act in the employer's interest, not in your own. Therefore, it is unethical to invest heavily in a competitor's stock, because that could jeopardize your objectivity and judgment. For the same reason, it is unethical (and illegal) to accept bribes or kickbacks. It is unethical to devote considerable time to moonlighting (performing an outside job, such as private consulting), because the outside job could lead to a conflict of interest and because the heavy workload could make you less productive in your primary position. However, you do not owe your employer absolute loyalty; if your employer is acting unethically, you have an obligation to try to change that behavior—even, if necessary, by blowing the whistle.

*For more about whistle-blowing, see p. 32.*

## OBLIGATIONS TO THE PUBLIC

Every organization that offers products or provides services is obligated to treat its customers fairly. As a representative of an organization, and especially as an employee communicating technical information, you will frequently confront ethical questions.

In general, an organization is acting ethically if its product or service is both *safe* and *effective*. The product or service must not injure or harm the consumer, and it must fulfill its promised function. However, these commonsense principles provide little guidance in dealing with the complicated ethical problems that arise routinely.



The U.S. Consumer Product Safety Commission (2015) estimates that more than 3,700 deaths and 15 million injuries occurred in the United States in 2015 because of consumer products—not counting automobiles and medications. Even more common, of course, are product and service failures: products or services don't do what they are supposed to do, products are difficult to assemble or operate, they break down, or they require more expensive maintenance than the product information indicates.

Who is responsible for injuries and product failures: the company that provides the product or service or the consumer who purchases it? In individual cases, blame is sometimes easy enough to determine. A person who operates a chainsaw without reading the safety information and without seeking any instruction in how to use it is to blame for any injuries caused by the normal operation of the saw. But a manufacturer that knows that the chain on the saw is liable to break under certain circumstances and fails to remedy this problem or warn the consumer is responsible for any resulting accidents.

Unfortunately, these principles do not outline a rational theory that can help companies understand how to act ethically in fulfilling their obligations to the public. Today, most court rulings are based on the premise that the manufacturer knows more about its products than the consumer does and therefore has a greater responsibility to make sure the products comply with all of the manufacturer's claims and are safe. Therefore, in designing, manufacturing, testing, and communicating about a product, the manufacturer has to make sure the product will be safe and effective when used according to the instructions. However, the manufacturer is not liable when something goes wrong that it could not have foreseen or prevented.

## OBLIGATIONS TO THE ENVIRONMENT

One of the most important lessons we have learned in recent decades is that we are polluting and depleting our limited natural resources at an unacceptably high rate. Our excessive use of fossil fuels not only deprives future generations of them but also causes possibly irreversible pollution problems, such as global warming. Everyone—government, businesses, and individuals—must work to preserve the environment to ensure the survival not only of our own species but also of the other species with which we share the planet.

But what does this have to do with you? In your daily work, you probably do not cause pollution or deplete the environment in any extraordinary way. Yet you will often know how your organization's actions affect the environment. For example, if you work for a manufacturing company, you might be aware of the environmental effects of making or using your company's products. Or you might help write an environmental impact statement.

As communicators, we should treat every actual or potential occurrence of environmental damage seriously. We should alert our supervisors to the situation and work with them to try to reduce the damage. The difficulty, of course, is that protecting the environment can be expensive. Clean fuels usually cost more than dirty ones. Disposing of hazardous waste properly costs more (in the short run) than merely dumping it. Organizations that want to reduce costs may be tempted to cut corners on environmental protection.

## Your Legal Obligations

Ethical and legal obligations are closely related. In fact, our ethical values have shaped many of our laws. For this reason, professionals should know the basics of four different bodies of law: copyright, trademark, contract, and liability.

### COPYRIGHT LAW

As a student, you are frequently reminded to avoid plagiarism. A student caught plagiarizing would likely fail the assignment and possibly the course and might even be expelled from school. A medical researcher or a reporter caught plagiarizing would likely be fired or at least find it difficult to publish in the future. But plagiarism is an ethical, not a legal, issue. Although a plagiarist might be expelled from school or be fired, he or she will not be fined or sent to prison.

By contrast, copyright is a legal issue. Copyright law is the body of law that relates to the appropriate use of a person's intellectual property: written documents, pictures, musical compositions, and the like. Copyright literally refers to a person's *right* to *copy* the work that he or she has created.

The most important concept in copyright law is that only the copyright holder—the person or organization that owns the work—can copy it. For instance, if you work for Zipcar, you can legally copy information from the Zipcar website and use it in other Zipcar documents. This reuse of information is routine in business, industry, and government because it helps ensure that the information a company distributes is both consistent and accurate.

However, if you work for Zipcar, you cannot simply copy information that you find on the Car2Go website and put it in Zipcar publications. Unless you obtained written permission from Car2Go to use its intellectual property, you would be infringing on Car2Go's copyright.

Why doesn't the Zipcar employee who writes the information for Zipcar own the copyright to that information? The answer lies in a legal concept known as *work made for hire*. Anything written or revised by an employee on the job is the company's property, not the employee's.

Although copyright gives the owner of the intellectual property some rights, it doesn't give the owner all rights. You can place small portions of copyrighted text in your own document without getting formal permission from the copyright holder. When you quote a few lines from an article, for example, you are taking advantage of a part of copyright law called *fair use*. Under fair-use guidelines, you have the right to use a portion of a published



### GUIDELINES Determining Fair Use

Courts consider four factors in disputes over fair use:

- **The purpose and character of the use, especially whether the use is for profit.** Profit-making organizations are scrutinized more carefully than nonprofits.
- **The nature and purpose of the copyrighted work.** When the information is essential to the public—for example, medical information—the fair-use principle is applied more liberally.
- **The amount and substantiality of the portion of the work used.** A 200-word passage would be a small portion of a book but a large portion of a 500-word brochure.
- **The effect of the use on the potential market for the copyrighted work.** Any use of the work that is likely to hurt the author's potential to profit from the original work would probably not be considered fair use.

work, without getting permission, for purposes such as criticism, commentary, news reporting, teaching, scholarship, or research. Because fair use is based on a set of general guidelines that are meant to be interpreted on a case-by-case basis, you should still cite the source accurately to avoid potential plagiarism.

A new trend is for copyright owners to stipulate which rights they wish to retain and which they wish to give up. You might see references to Creative Commons, a not-for-profit organization that provides symbols for copyright owners to use to communicate their preferences. Figure 2.1 shows four of the Creative Commons symbols. A benefit of using materials with Creative Commons licenses is that you don't have to track down the copyright holder to ask for permission. Note that many Internet search engines allow you to search for Creative Commons materials.

**Attribution.** You must attribute the work in the manner specified by the author or licensor (but not in any way that suggests that they endorse you or your use of the work).

**Noncommercial.** You may not use this work for commercial purposes.

**No Derivative Works.** You may not alter, transform, or build upon this work.

**Share Alike.** If you alter, transform, or build upon this work, you may distribute the resulting work only under the same or similar license to this one.

**FIGURE 2.1 Selected Licensing Symbols from Creative Commons**

*The organization has created a number of symbols to represent rights that copyright owners can retain or release.*

Licensed under a Creative Commons Attribution 4.0 International License, https://creativecommons.org/licenses/by/4.0/.

*For more about documenting your sources, see Appendix, Part B.*

## GUIDELINES Dealing with Copyright Questions

Consider the following advice when using material from another source.

- **Abide by the fair-use concept.** Do not rely on excessive amounts of another source's work (unless the information is your company's own boilerplate).
- **Seek permission.** Write to the source, stating what portion of the work you wish to use and the publication you wish to use it in. The source is likely to charge you for permission.
- **Cite your sources accurately.** Citing sources fulfills your ethical obligation and strengthens your writing by showing the reader the range of your research.
- **Consult legal counsel if you have questions.** Copyright law is complex. Don't rely on instinct or common sense.

**ETHICS NOTE**

### DISTINGUISHING PLAGIARISM FROM ACCEPTABLE REUSE OF INFORMATION

Plagiarism is the act of using someone else's words or ideas without giving credit to the original author. It doesn't matter whether the writer intended to plagiarize. Obviously, it is plagiarism to borrow or steal graphics, video or audio media, written passages, or entire documents and then use them without attribution. Web-based sources are particularly vulnerable to plagiarism, partly because people mistakenly think that if information is on the web it is free to borrow and partly because this material is so easy to copy, paste, and reformat.

However, writers within a company often reuse one another's information without giving credit — and this is completely ethical. For instance, companies publish press releases when they wish to publicize news. These press releases typically conclude with descriptions of the company and how to get in touch with an employee who can answer questions about the company's products or services. These descriptions, sometimes called *boilerplate*, are simply copied and pasted from previous press releases. Because these descriptions are legally the intellectual property of the company, reusing them in this way is completely honest. Similarly, companies often *repurpose* their writing. That is, they copy a description of the company from a press release and paste it into a proposal or an annual report. This reuse also is acceptable.

When you are writing a document and need a passage that you suspect someone in your organization might already have written, ask a more experienced co-worker whether the culture of your organization permits reusing someone else's writing. If the answer is yes, check with your supervisor to see whether he or she approves of what you plan to do.

## TRADEMARK LAW

Companies use *trademarks* and *registered trademarks* to ensure that the public recognizes the name or logo of a product.

- A *trademark* is a word, phrase, name, or symbol that is identified with a company. The company uses the ™ symbol after the product name to claim the design or device as a trademark. However, using this symbol does not grant the company any legal rights. It simply sends a message to other organizations that the company is claiming a trademark.



## GUIDELINES Protecting Trademarks

Use the following techniques to protect your client's or employer's trademark.

- **Distinguish trademarks from other material.** Use boldface, italics, a different typeface, a different type size, or a different color to distinguish the trademarked item.
- **Use the trademark symbol.** At least once in each document — preferably the first time the name or logo appears — use the appropriate symbol after the name or logo, followed by an asterisk. At the bottom of the page, include a statement such as the following: "*COKE is a registered trademark of the Coca-Cola Company."
- **Use the trademarked item's name as an adjective, not as a noun or verb.** Trademarks can become confused with the generic term they refer to. Use the trademarked name along with the generic term, as in Xerox® photocopier or LaserJet® printer.

| | |
|---|---|
| DOES NOT PROTECT TRADEMARK | buy three LaserJets® |
| PROTECTS TRADEMARK | buy three LaserJet® printers |

- **Do not use the possessive form of the trademarked name.** Doing so reduces the uniqueness of the item and encourages the public to think of the term as generic.

| | |
|---|---|
| DOES NOT PROTECT TRADEMARK | iPad's® fine quality |
| PROTECTS TRADEMARK | the fine quality of iPad® tablets |

- A *registered trademark* is a word, phrase, name, or symbol that the company has registered with the U.S. Patent and Trademark Office. The company can then use the ® symbol after the trademarked item. Registering a trademark, a process that can take years, ensures much more legal protection than a simple trademark throughout the United States, as well as in other nations. Although a company is not required to use the symbol, doing so makes it easier for the company to take legal action against another organization that it believes has infringed on its trademark.

All employees are responsible for using trademark and registered trademark symbols accurately when referring to a company's products.

## CONTRACT LAW

Contract law deals with agreements between two parties. In most cases, disputes concern whether a product lives up to the manufacturer's claims. These claims take the form of express warranties or implied warranties.

An *express warranty* is a written or oral statement that the product has a particular feature or can perform a particular function. For example, a statement in a printer manual that the printer produces 17 pages per minute is an express warranty. An *implied warranty* is one of two kinds of non-written guarantees:

- The *merchantability warranty* guarantees that the product is of at least average quality and appropriate for the ordinary purposes it was intended to serve.
- The *fitness warranty* guarantees that the product is suitable for the buyer's purpose if the seller knows that purpose. For example, if a car salesperson knows that a buyer wishes to pull a 5,000-pound trailer but also knows that a car cannot pull such a load, the salesperson is required to inform the buyer of this fact.

## LIABILITY LAW

Under product-liability law, a manufacturer or seller of a product is liable for injuries or damages caused by the use of that product. Liability is an important concern for communicators, because courts frequently rule that manufacturers are responsible for providing adequate operating instructions and for warning consumers about the risks of using their products. Figure 2.2 shows a warning label used to inform people of how to avoid a safety risk.

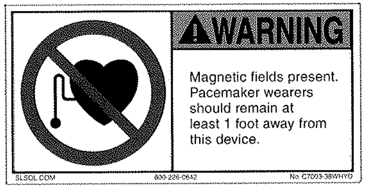



**FIGURE 2.2** A Warning Label

*This warning label uses symbols — such as the orange box, the red circle with the slash, and the image of the heart and pacemaker — and words to visually and verbally warn people with pacemakers to stay away from a device that can hurt them. The warning helps the company do the right thing — and avoid product-liability lawsuits.*

Reproduced with permission from www.safetylabelsolutions.com.

Manufacturers of products used in the United States have a legal *duty to warn* users by providing safety labels on products (and the same information in their accompanying instructions) and by explaining in the instructions how to use the products safely. According to intellectual-property attorney Kenneth Ross (2011), the manufacturer has this duty to warn when all four of these characteristics apply:

1. The product is dangerous.
2. The danger is or should be known by the manufacturer.
3. The danger is present when the product is used in the usual and expected manner.
4. The danger is not obvious to or well known by the user.

The complication for technical communicators is that one set of guidelines regarding duty to warn is used in the United States (the American National Standards Institute's ANSI Z535, last revised in 2011) and another set is used in the European Union (the International Organization for Standardization's ISO 3864, which is updated periodically). Both sets of guidelines are relatively vague, and they contradict each other in important ways. Therefore, before publishing labels or instructions for products that can be dangerous, consult with an attorney who specializes in liability issues.



## GUIDELINES Abiding by Liability Laws

Pamela S. Helyar summarizes the communicator's obligations and offers ten guidelines for abiding by liability laws (1992):

- **Understand the product and its likely users.** Learn everything you can about the product and its users.
- **Describe the product's functions and limitations.** Help people determine whether it is the right product to buy. In one case, a manufacturer was found liable for not stating that its electric smoke alarm does not work during a power outage.
- **Instruct users on all aspects of ownership.** Include assembly, installation, use and storage, testing, maintenance, first aid and emergencies, and disposal.
- **Use appropriate words and graphics.** Use common terms, simple sentences, and brief paragraphs. Structure the document logically, and include specific directions. Make graphics clear and easy to understand; where necessary, show people performing tasks. Make the words and graphics appropriate to the educational level, mechanical ability, manual dexterity, and intelligence of intended users. For products that will be used by children or nonnative speakers of your language, include graphics illustrating important information.
- **Warn users about the risks of using or misusing the product.** Warn users about the dangers of using the product, such as chemical poisoning. Describe the cause, extent, and seriousness of the danger. A car manufacturer was found liable for not having warned consumers that parking a car on grass, leaves, or other combustible material could cause a fire. For particularly dangerous products, explain the danger and how to avoid it, and then describe how to use the product safely. Use *mandatory language*, such as *must* and *shall*, rather than *might*, *could*, or *should*. Use the words *warning* and *caution* appropriately.

*For a discussion of danger, warning, and caution, see Ch. 20, p. 564.*

- **Include warnings along with assertions of safety.** When product information says that a product is safe, readers tend to pay less attention to warnings. Therefore, include detailed warnings to balance the safety claims.
- **Make directions and warnings conspicuous.** Safety information must be in large type and easily visible, appear in an appropriate location, and be durable enough to withstand ordinary use of the product.
- **Make sure that the instructions comply with applicable company standards and local, state, and federal laws.**
- **Perform usability testing.** Test the product (to make sure it is safe and easy to use) and test the instructions (to make sure they are accurate and easy to understand).

*For a discussion of usability testing, see Ch. 13.*

- **Make sure users receive the information.** If you discover a problem after the product has been shipped to retailers, tell users by direct mail or email, if possible, or newspaper and online advertising if not. Automobile-recall notices are one example of how manufacturers contact their users.

## The Role of Corporate Culture in Ethical and Legal Conduct

Most employees work within organizations, such as corporations and government agencies. We know that organizations exert a powerful influence on their employees' actions. According to a national study by the Ethics & Compliance Initiative of more than 6,400 employees in various businesses (2013), organizations with strong ethical cultures—organizations in which ethical values are promoted at all levels and employees see that everyone lives up to the organization's stated values—experience fewer ethical problems than organizations with weak ethical cultures. In organizations with strong ethical cultures, far fewer employees feel pressure to commit misconduct, far fewer employees observe misconduct, far more employees report the misconduct that they see, and there is far less retaliation against employees who report misconduct.

Companies can take specific steps to improve their ethical culture:

- The organization's leaders can set the right tone by living up to their commitment to ethical conduct.
- Supervisors can set good examples and encourage ethical conduct.
- Peers can support those employees who act ethically.
- The organization can use informal communication to reinforce the formal policies, such as those presented in a company code of conduct.

In other words, it is not enough for an organization to issue a statement that ethical and legal behavior is important. The organization has to create a culture that values and rewards ethical and legal behavior. That culture starts at the top and extends to all employees, and it permeates the day-to-day operations of the organization.

An important element of a culture of ethical and legal conduct is a formal code of conduct. Most large corporations in the United States have one, as do almost all professional societies. (U.S. companies that are traded publicly are required to state whether they have a code of conduct—and if not, why not.) Figure 2.3 shows some excerpts from the Texas Instruments code of conduct. Codes of conduct vary greatly from organization to organization, but most of them address such issues as the following:

- adhering to local laws and regulations, including those intended to protect the environment
- avoiding discrimination
- maintaining a safe and healthy workplace
- respecting privacy
- avoiding conflicts of interest



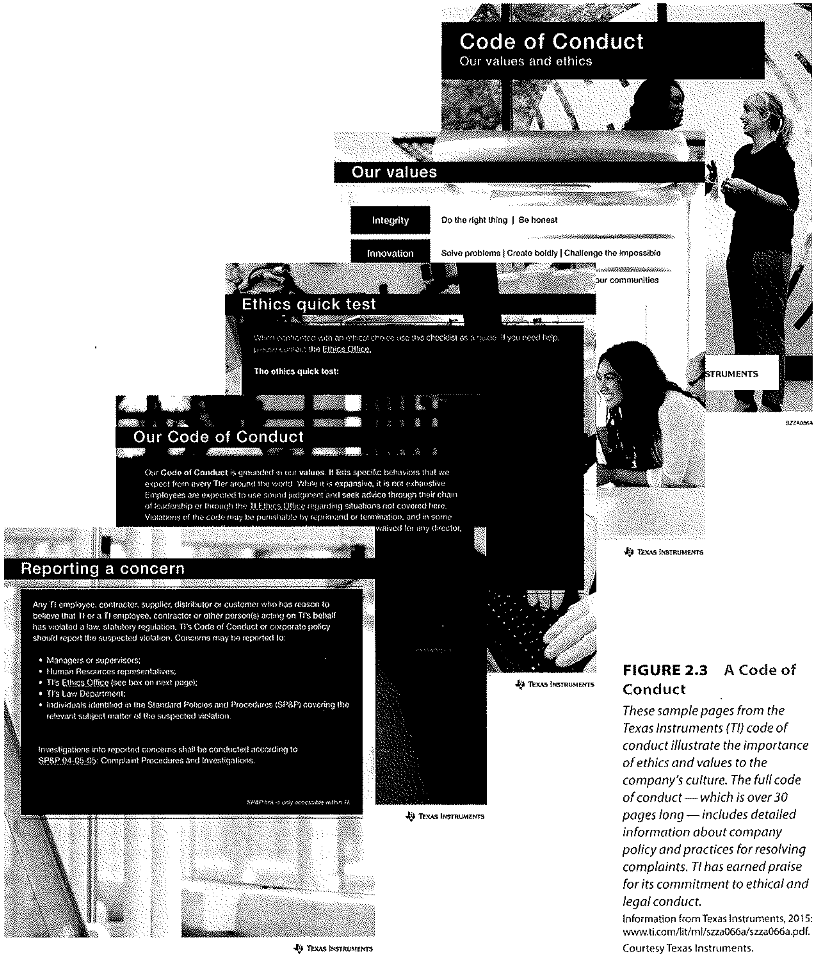



**FIGURE 2.3** A Code of Conduct

*These sample pages from the Texas Instruments (TI) code of conduct illustrate the importance of ethics and values to the company's culture. The full code of conduct—which is over 30 pages long—includes detailed information about company policy and practices for resolving complaints. TI has earned praise for its commitment to ethical and legal conduct.*

Information from Texas Instruments, 2015: www.ti.com/lit/ml/szza066a/szza066a.pdf.

Courtesy Texas Instruments.

- protecting the company's intellectual property
- avoiding bribery and kickbacks in working with suppliers and customers

A code of conduct focuses on behavior, including adhering to the law. Many codes of conduct are only a few paragraphs long; others are lengthy and detailed, some consisting of several volumes.

An effective code has three major characteristics:

- **It protects the public rather than members of the organization or profession.** For instance, the code should condemn unsafe building practices but not advertising, which increases competition and thus lowers prices.
- **It is specific and comprehensive.** A code is ineffective if it merely states that people must not steal or if it does not address typical ethical offenses such as bribery in companies that do business in other countries.
- **It is enforceable.** A code is ineffective if it does not stipulate penalties, including dismissal from the company or expulsion from the profession.

Although many codes are too vague to be useful in determining whether a person has violated one of their principles, writing and implementing a code can be valuable because it forces an organization to clarify its own values and fosters an increased awareness of ethical issues. Texas Instruments, like many organizations, encourages employees to report ethical problems to a committee or a person (sometimes called an *ethics officer* or an *ombudsperson*) who investigates and reaches an impartial decision.

If you think there is a serious ethical problem in your organization, find out what resources your organization offers to deal with it. If there are no resources, work with your supervisor to solve the problem.

What do you do if the ethical problem persists even after you have exhausted all the resources at your organization and, if appropriate, the professional organization in your field? The next step will likely involve *whistle-blowing*—the practice of going public with information about serious unethical conduct within an organization. For example, an engineer is blowing the whistle when she tells a regulatory agency or a newspaper that quality-control tests on a company product were faked.

Ethicists such as Velasquez (2011) argue that whistle-blowing is justified if you have tried to resolve the problem through internal channels, if you have strong evidence that the problem is hurting or will hurt other parties, and if the whistle-blowing is reasonably certain to prevent or stop the wrongdoing. But Velasquez also points out that whistle-blowing is likely to hurt the employee, his or her family, and other parties. Whistle-blowers can be penalized through negative performance appraisals, transfers to undesirable locations, or isolation within the company. The Ethics & Compliance Initiative (2013) reports that more than 21 percent of whistle-blowers experienced retaliation.



## Understanding Ethical and Legal Issues Related to Social Media

There is probably some truth to social-media consultant Peter Shankman's comment "For the majority of us, social media is nothing more than a faster way to screw up in front of a larger number of people in a shorter amount of time" (Trillos-Decarie, 2012). As social media have become more important in the workplace, we are starting to get a better idea of both their rewards and their risks. Certainly, social media have created many new and exciting ways for people in the workplace to connect with each other and with other stakeholders outside the organization. However, the widespread use of social media by employees in the workplace and in their private lives also presents challenges.

User-generated content, whether it is posted to Facebook, Twitter, LinkedIn, YouTube, Google Groups, Yelp, Pinterest, or any of the many other online services, presents significant new ethical and legal issues. Just as employers are trying to produce social-media policies that promote the interests of the organization without infringing on employees' rights of free expression, all of us need to understand the basics of ethical and legal principles related to these new media.

A 2014 report by the law firm Proskauer Rose LLP, "Social Media in the Workplace Around the World 3.0," surveyed over 100 companies from the United States and many other countries. Here are some of the survey findings (Proskauer Rose LLP, 2014, p. 2):

- Almost 80 percent of employers have social-media policies.
- More than one-third of employers block employee access to social media.
- More than half of the employers reported problems caused by misuse of social media by employees. Over 70 percent of businesses have had to take disciplinary action against an employee for misuse of social media.

Over the next few years, organizations will revise their policies about how employees may use social media in the workplace, just as courts will clarify some of the more complicated issues related to social media and the law. For these reasons, what we now see as permissible and ethical is likely to change. Still, it is possible to identify a list of best practices that can help you use social media wisely—and legally—in your career.

Finally, a related suggestion: avoid criticizing your employer online. Although defamation laws forbid making untrue factual statements about your employer, you are in fact permitted to criticize your employer, online or offline. The National Labor Relations Board has ruled that doing so is legal because it is protected discussion about "working conditions." Our advice: if you're angry, move away from the keyboard. Once you post something, you've lost control of it.

However, if you think your employer is acting illegally or unethically, start by investigating the company's own resources for addressing such problems. Then, if you are still dissatisfied, consider whistle-blowing, which is discussed on p. 32.

## GUIDELINES Using Social Media Ethically and Legally

These nine guidelines can help you use social media to your advantage in your career.

- **Keep your private social-media accounts separate from your company-sponsored accounts.** After you leave a company, you don't want to get into a dispute over who "owns" an account. Companies can argue, for example, that your collection of Twitter followers is in fact a customer list and therefore the company's intellectual property. Regardless of whether you post from the workplace or at home, post only about business on your company-sponsored accounts.
- **Read the terms of service of every service to which you post.** Although you retain the copyright on original content that you post, most social-media services state that they can re-post your content wherever and whenever they want, without informing you, getting your permission, or paying you. Many employers would consider this policy unacceptable.
- **Avoid revealing unauthorized news about your own company.** A company that wishes to apply for a patent for one of its products or processes has, according to the law, only one year to do so after the product or process is first mentioned or illustrated in a "printed publication." Because courts have found that a photo on Facebook or a blog or even a tweet is equivalent to a printed publication (Bettinger, 2010), you could inadvertently start the clock ticking. Even worse, some other company could use the information to apply for a patent for the product or process that *your* company is developing. Or suppose that on your personal blog, you reveal that your company's profits will dip in the next quarter. This information could prompt investors to sell shares of your company's stock, thereby hurting everyone who owns shares—including you and most of your co-workers.
- **Avoid self-plagiarism.** Self-plagiarizing is the act of publishing something you have already published. If you write an article for your company newsletter and later publish it on a blog, you are violating your company's copyright, because your newsletter article was a work made for hire and therefore the company's intellectual property.
- **Avoid defaming anyone.** Defamation is the legal term for making false statements of fact about a person that could harm that person. Defamation includes libel (making such statements in writing, as in a blog post) and slander (making them in speech, as in a video posted online). In addition, you should not re-post libelous or slanderous content that someone else has created.
- **Don't live stream or quote from a speech or meeting without permission.** Although you may describe a speech or meeting online, you may not stream video or post quotations without permission.
- **Avoid false endorsements.** The Federal Trade Commission has clear rules defining false advertising. The most common type of false advertising involves posting a positive review of a product or company in exchange for some compensation.

(continued)



For instance, some unscrupulous software companies give reviewers a copy of the software to be reviewed (which is perfectly legal) loaded on an expensive computer that the reviewers can keep. Unless the reviewer explicitly notes in the review the compensation from the software company, posting the positive review is considered false advertising. Similarly, you should not endorse your own company's products without stating your relationship with the company (U.S. Federal Trade Commission, 2015).

- **Avoid impersonating someone else online.** If that person is real (whether alive or dead), you could be violating his or her right of publicity (the right to control his or her name, image, or likeness). If that person is a fictional character, such as a character on a TV show or in a movie, you could be infringing on the copyright of whoever created that character.
- **Avoid infringing on trademarks by using protected logos or names.** Don't include copyrighted or trademarked names, slogans, or logos in your posts unless you have received permission to do so. Even if the trademark owner likes your content, you probably will be asked to stop posting it. If the trademark owner dislikes your content, you are likely to face a more aggressive legal response.

# Communicating Ethically Across Cultures

The United States exports more than $2.2 trillion worth of goods and services to the rest of the world (U.S. Census Bureau, 2016). U.S. companies do not necessarily have the same ethical and legal obligations when they export as when they sell in the United States. For this reason, communicators should understand the basics of two aspects of writing for people in other countries: communicating with cultures with different ethical beliefs and communicating in countries with different laws.

## COMMUNICATING WITH CULTURES WITH DIFFERENT ETHICAL BELIEFS

Companies face special challenges when they market their products and services to people in other countries (and to people in their home countries who come from other cultures). Companies need to decide how to deal with situations in which the target culture's ethical beliefs clash with those of their own culture. For instance, in many countries, sexual discrimination makes it difficult for women to assume responsible positions in the workplace. If a U.S. company that sells cell phones, for example, wishes to present product information in such a country, should it reinforce this discrimination by excluding women from photographs of its products? Ethicist Thomas Donaldson argues that doing so is wrong (1991). According to the principle he calls the *moral minimum*, companies are ethically obligated not to reinforce patterns of discrimination in product information.

However, Donaldson argues, companies are not obligated to challenge the prevailing prejudice directly. A company is not obligated, for example, to include photographs that show women performing roles they do not normally

**DOCUMENT ANALYSIS ACTIVITY**

## Presenting Guidelines for Using Social Media

This excerpt is from a corporate social-media policy statement. The questions below ask you to think about how to make the policy statement clearer and more useful (as discussed on page 34).

1. The "Overview" section discusses the company's social-media policy guidelines in terms of etiquette. In what way is "etiquette" an appropriate word to describe the policy? In what way is it inappropriate?
2. The "What Are Social Media?" section provides little useful information. What other information might it include to make the document more useful to Paragon employees?
3. The bulleted guidelines are vague. Revise any two of them to include more specific information.

❶ *Overview*

In today's world, just about everything we do online can be traced back to us and can have an impact (for better or worse) on a company. Paragon wants to remind you that the company policies on anti-harassment, ethics, and company loyalty extend to all media. There is a certain etiquette you should abide by when you participate online. This document is not intended to be restrictive, but to provide some guidelines on proper social-networking etiquette.

❷ *What Are Social Media?*

Social media are the tools and content that enable people to connect online, share their interests, and engage in conversations.

*Guidelines*

These policies apply to individuals who want to participate in social-media conversations on behalf of Paragon. Please be mindful that your behavior at all times reflects on Paragon as a whole. Do not write or post anything that might reflect negatively on Paragon.

❸
- Always use your best judgment and be honest.
- Be respectful of confidential information (such as clients, financials).
- Always be professional, especially when accepting criticism.
- Participate, don't promote. Bring value. Give to get.
- Write only about what you know.
- When in doubt, ask for help/clarification.
- Seek approval before commenting on any articles that portray Paragon negatively.



perform within a particular culture, nor is it obligated to portray women wearing clothing, makeup, or jewelry that is likely to offend local standards. But there is nothing to prevent an organization from adopting a more activist stance. Organizations that actively oppose discrimination are acting admirably.

### COMMUNICATING IN COUNTRIES WITH DIFFERENT LAWS

When U.S. companies export goods and services to other countries, they need to adhere to those countries' federal and regional laws. For instance, a company that wishes to export to Germany must abide by the laws of Germany and of the European Union, of which it is a part. In many cases, the target region will not allow the importation of goods and services that do not conform to local laws. The hazardous-product laws of the European Union, in particular, are typically more stringent than those of the United States.

Because exporting goods to countries with different laws is such a complex topic, companies that export devote considerable resources to finding out what they need to do, not only in designing and manufacturing products but also in writing the product information. For a good introduction to this topic, see Lipus (2006).

## Principles for Ethical Communication

Although it is impossible to state principles for ethical communication that will guide you through all the challenges you will face communicating in the workplace, the following eleven principles provide a starting point.

### ABIDE BY RELEVANT LAWS

You must adhere to the laws governing intellectual property, contracts, and liability. Here are some examples:

- **Do not violate copyright.** When you want to publish someone else's copyrighted material, such as graphics you find on the web, get written permission from the copyright owner.
- **Honor the laws regarding trademarks.** For instance, use the trademark symbol (™) and the registered trademark symbol (®) properly.
- **Live up to the express and implied warranties on your company's products.**
- **Abide by all laws governing product liability.** Helyar's (1992) guidelines, presented on page 29, are a good introduction for products to be sold in the United States. Lipus's (2006) guidelines are useful for products to be sold outside the United States.

### COMPLY WITH ACCESSIBILITY STANDARDS

The federal government has outlined standards for making websites and other forms of technical communication accessible to all users, including people with disabilities, who make up about 8 percent of the population

*For more on accessibility, see Ch. 11, pp. 281–84.*

(U.S. Department of Health and Human Services, 2016). Government sites are required to comply with Section 508 of the Rehabilitation Act, and the Department of Health and Human Services encourages all private and commercial sites to do the same.

In some cases, companies can be held liable for not making their communication accessible. For example, Target was sued (and lost) for not making its website accessible for blind customers, a violation of the Americans with Disabilities Act (Miranda-Hess, 2013).

## ABIDE BY THE APPROPRIATE PROFESSIONAL CODE OF CONDUCT

Your field's professional organization, such as the American Society of Civil Engineers, is likely to have a code that goes beyond legal issues to express ethical principles, such as telling the truth, reporting information accurately, respecting the privacy of others, and avoiding conflicts of interest.

## ABIDE BY YOUR ORGANIZATION'S POLICY ON SOCIAL MEDIA

If your employer has a written policy about how employees may use social media, study it. If there is no written policy, check with Human Resources or your supervisor for advice. If you think that you will be unable to abide by the employer's policy—whether written or not—you should not work there or you should abide by it while you try to change it.

## TAKE ADVANTAGE OF YOUR EMPLOYER'S ETHICS RESOURCES

Your employer is likely to have a code of conduct, as well as other resources, such as an Ethics Office, which can help you find information to guide you in resolving ethical challenges you encounter. Your employer will likely have a mechanism for anonymously registering complaints about unethical conduct.

## TELL THE TRUTH

Sometimes, employees are asked to lie about their companies' products or about those of their competitors. Obviously, lying is unethical. Your responsibility is to resist this pressure, going over your supervisor's head if necessary.

## DON'T MISLEAD YOUR READERS

*For a more detailed discussion of misleading writing, see Ch. 10. For a discussion of avoiding misleading graphics, see Ch. 12.*

A misleading statement—one that invites or even encourages the reader to reach a false conclusion—is ethically no better than lying. Avoid these four common kinds of misleading technical communication:

*For techniques for writing clearly, including avoiding discriminatory language, see Ch. 10.*

- **False implications.** If, as an employee of SuperBright, you write "Use only SuperBright batteries in your new flashlight," you imply that only that brand will work. If that is untrue, the statement is misleading. Communicators sometimes use clichés such as *user-friendly*, *ergonomic*, and *state-of-the-art* to make a product sound better than it is; use specific, accurate information to back up your claims about a product.



- **Exaggerations.** If you say "Our new Operating System 2500 makes system crashes a thing of the past" when the product only makes them less likely, you are exaggerating. Provide specific technical information on the reduction of crashes. Similarly, do not write "We carried out extensive market research" if all you did was make a few phone calls.
- **Legalistic constructions.** It is unethical to write "The 3000X was designed to operate in extreme temperatures, from –40 degrees to 120 degrees Fahrenheit" if the product does not operate reliably in those temperatures. Although the statement might technically be accurate—the product was *designed* to operate in those temperatures—it is misleading.
- **Euphemisms.** If you refer to someone's being fired, say *released*, not *granted permanent leave* or *offered an alternative career opportunity*.

## USE DESIGN TO HIGHLIGHT IMPORTANT ETHICAL AND LEGAL INFORMATION

Courts have found that burying information in footnotes or printing it in very small type violates a company's obligation to inform consumers and warn them about hazards in using a product. When you want to communicate safety information or other facts that readers need to know, use design features to make that information easy to see and understand. Figure 2.4 shows how design principles can be used to communicate nutritional information on food labels.

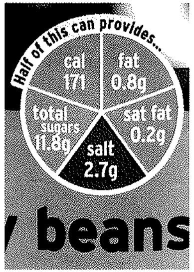



**FIGURE 2.4 Using Design to Emphasize Important Information**
*This nutritional labeling system is called "traffic-light labeling" because it uses red and green to indicate how healthful a food is.*
Shaun Finch—Coyote-Photography.co.uk/Alamy.

## BE CLEAR

Clear writing helps your readers understand your message easily. Your responsibility is to write as clearly as you can to help your audience understand what you are saying. For instance, if you are writing a product warranty, make it as simple and straightforward as possible. Don't hide behind big words and complicated sentences. Use tables of contents, indexes, and other accessing devices to help your readers find what they need.

## AVOID DISCRIMINATORY LANGUAGE

Don't use language that discriminates against people because of their sex, religion, ethnicity, race, sexual orientation, or physical or mental abilities. Employees have been disciplined or fired for sending inappropriate jokes through the company email system.

## ACKNOWLEDGE ASSISTANCE FROM OTHERS

Don't suggest that you did all the work yourself if you didn't. Cite your sources and your collaborators accurately and graciously. For more about citing sources, see Appendix, Part B.

## WRITER'S CHECKLIST

- ☐ Did you abide by relevant laws? (*p. 37*)
- ☐ Did you comply with accessibility standards? (*p. 37*)
- ☐ Did you abide by the appropriate corporate or professional code of conduct? (*p. 38*)
- ☐ Did you abide by your organization's policy on social media? (*p. 38*)
- ☐ Did you take advantage of your company's ethics resources? (*p. 38*)
- ☐ Did you tell the truth? (*p. 38*)

Did you avoid using

- ☐ false implications? (*p. 38*)
- ☐ exaggerations? (*p. 39*)
- ☐ legalistic constructions? (*p. 39*)
- ☐ euphemisms? (*p. 39*)

- ☐ Did you use design to highlight important ethical and legal information? (*p. 39*)
- ☐ Did you write clearly? (*p. 39*)
- ☐ Did you avoid discriminatory language? (*p. 39*)
- ☐ Did you acknowledge any assistance you received from others? (*p. 39*)

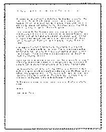
## EXERCISES

*For more about memos, see Ch. 14, p. 376.*

1. It is late April, and you need a summer job. On your town's news website, you see an ad for a potential job. The only problem is that the ad specifically mentions that the job is "a continuing, full-time position." You know that you will be returning to college in the fall. Is it ethical for you to apply for the job without mentioning this fact? Why or why not? If you believe it is unethical to withhold that information, is there any ethical way you can apply? Be prepared to share your ideas with the class.
2. You serve on the Advisory Committee of your college's bookstore, which is a private business that leases space on campus and donates 10 percent of its profits to student scholarships. The head of the bookstore wishes to stock Simple Study Guides, a popular series of plot summaries and character analyses of classic literary works. In similar bookstores, the sale of Simple Study Guides yields annual profits of over $10,000. Six academic departments have signed a statement condemning the idea. Should you support the bookstore head or the academic departments? Be prepared to discuss your answer with the class.
3. Using the search term "social media policy examples," find a corporate policy statement on employee use of social media. In a 500-word memo to your instructor, explain whether the policy statement is clear, specific, and comprehensive. Does the statement include a persuasive explanation of why the policy is necessary? Is the tone of the statement positive or negative? How would you feel if you were required to abide by this policy? If appropriate, include a copy of the policy statement (or a portion of it) so that you can refer to it in your memo.
4. **TEAM EXERCISE** Form small groups. Study the website of a company or other organization that has a prominent role in your community or your academic field. Find information about the organization's commitment to ethical and legal conduct. Often, organizations present this information in sections with titles such as "information for investors," "about the company," or "values and principles of conduct."
   - One group member could identify the section that states the organization's values. How effective is this section in presenting information that goes beyond general statements about the importance of ethical behavior?
   - A second group member could identify the section that describes the organization's code of conduct. Does the organization seem to take principles of ethical and legal behavior seriously? Can you get a clear idea from the description whether the organization has a specific, well-defined set of policies, procedures, and resources available for employees who wish to discuss ethical and legal issues?
   - A third group member could identify any information related to the organization's commitment to the environment. What does the organization do, in its normal operations, to limit its carbon footprint and otherwise encourage responsible use of natural resources and minimize damage to the environment?
   - As a team, write a memo to your instructor presenting your findings. Attach the organization's code of conduct to your memo.



## CASE 2: The Ethics of Requiring Students To Subsidize a Plagiarism-Detection Service



The provost of your university has sent a letter to you and other members of the Student Council proposing that the university subscribe to a plagiarism-detection service, the cost of which would be subsidized by students' tuition. You and other council members have some serious concerns about the proposal and decide to write to the provost, analyzing the ethical implications of requiring students to subsidize such a program. To read the provost's letter and begin drafting your response, go to LaunchPad.

CHAPTER 4

# Writing Collaboratively



**THE EXPLOSIVE GROWTH** of social media over the last decade has greatly expanded the scope of workplace collaboration, reducing former barriers of time and space. Today, people routinely collaborate not only with members of their project teams but also with others within and outside their organization, as shown in Figure 4.1.

But how exactly does this sort of collaboration work? In every possible way. For example, you and other members of your project team might use social media primarily to gather information that you will use in your research. You bring this information back to your team, and then you work exclusively with your team in drafting, revising, and proofreading your document. In a more complex collaboration pattern, you and other members of your team might use social media to gather information from sources around the globe and then reach out to others in your organization to see what they think of your new ideas. Later in the process, you create the outline of your document, in the form of a wiki, and authorize everyone in your own organization to draft sections, pose questions and comments, and even edit what others have written. In short, you can collaborate with any number of people at one or at several stages of the writing process.

*For more about the writing process, see Ch. 3.*

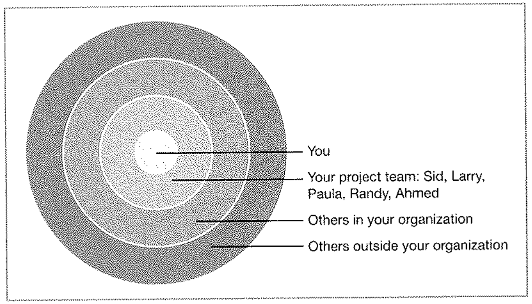



**FIGURE 4.1 Collaboration Beyond the Project Team**
*Using social media such as messaging technologies, videoconferencing, shared document workspaces, and wikis, you can tap into the world's knowledge for ideas and information.*

Every document is unique and will therefore call for a unique kind of collaboration. Your challenge is to think creatively about how you can work effectively with others to make your document as good as it can be. Being aware of the strengths and limitations of collaborative tools can prompt you to find people in your building and around the world who can help you think about your subject and write about it compellingly and persuasively.

## Advantages and Disadvantages of Collaboration

To complete a series of interactive team writing exercises, see *Team Writing* in LaunchPad.

As a student, you probably have already worked collaboratively on course projects. As a professional, you will work collaboratively on many more projects. In the workplace, the stakes might be higher. Effective collaboration can make you look like a star, but ineffective collaboration can ruin an important project—and hurt your reputation. The best way to start thinking about collaboration is to understand its main advantages and disadvantages.

### ADVANTAGES OF COLLABORATION

According to a survey conducted by Cisco Systems (2010), more than 75 percent of those surveyed said that collaboration is critical to their success on the job. Some 90 percent said that collaboration makes them more productive. Writers who collaborate can create a better document and improve the way an organization functions:

- **Collaboration draws on a wider knowledge base.** Therefore, a collaborative document can be more comprehensive and more accurate than a single-author document.



- **Collaboration draws on a wider skills base.** No one person can be an expert manager, writer, editor, graphic artist, and production person.
- **Collaboration provides a better idea of how the audience will read the document.** Because each collaborator acts as an audience, working with collaborators produces more questions and suggestions than one person could while writing alone.
- **Collaboration improves communication among employees.** Because you and your collaborators share a goal, you learn about each other's jobs, responsibilities, and frustrations.
- **Collaboration helps acclimate new employees to an organization.** New employees learn how things work—which people to see, which forms to fill out, and so forth—as well as what the organization values, such as ethical conduct and the willingness to work hard and sacrifice for an important initiative.
- **Collaboration motivates employees to help an organization grow.** New employees bring new skills, knowledge, and attitudes that can help the organization develop. More experienced employees mentor the new employees as they learn. Everyone teaches and learns from everyone else, and the organization benefits.

### DISADVANTAGES OF COLLABORATION

Collaboration can also have important disadvantages:

- **Collaboration takes more time than individual writing.** It takes longer because of the time needed for the collaborators to communicate. In addition, meetings—whether they are live or remote—can be difficult to schedule.
- **Collaboration can lead to groupthink.** When collaborators value getting along more than thinking critically about the project, they are prone to *groupthink*. Groupthink, which promotes conformity, can result in an inferior document, because no one wants to cause a scene by asking tough questions.
- **Collaboration can yield a disjointed document.** Sections can contradict or repeat each other or be written in different styles. To prevent these problems, writers need to plan and edit the document carefully.
- **Collaboration can lead to inequitable workloads.** Despite the project leader's best efforts, some people will end up doing more work than others.
- **Collaboration can reduce a person's motivation to work hard on the document.** A collaborator who feels alienated from the team can lose motivation to make the extra effort.
- **Collaboration can lead to interpersonal conflict.** People can disagree about the best way to create the document or about the document itself. Such disagreements can hurt working relationships during the project and long after.

## Managing Projects

At some point in your career, you will likely collaborate on a project that is just too big, too technical, too complex, and too difficult for your team to complete successfully without some advance planning and careful oversight. Often, collaborative projects last several weeks or months, and the efforts of several people are required at scheduled times for the project to proceed. For this reason, collaborators need to spend time managing the project to ensure that it not only meets the needs of the audience but also is completed on time and, if relevant, within budget.

### GUIDELINES Managing Your Project

These seven suggestions can help you keep your project on track.

- **Break down a large project into several smaller tasks.** Working backward from what you must deliver to your client or manager, partition your project into its component parts, making a list of what steps your team must take to complete the project. This task is not only the foundation of project management but also a good strategy for determining the resources you will need to complete the project successfully and on time. After you have a list of tasks to complete, you can begin to plan your project, assign responsibilities, and set deadlines.
- **Plan your project.** Planning allows collaborators to develop an effective approach and reach agreement before investing a lot of time and resources. Planning prevents small problems from becoming big problems with a deadline looming. Effective project managers use planning documents such as *needs analyses*, *information plans*, *specifications*, and *project plans*.
- **Create and maintain an accurate schedule.** An accurate schedule helps collaborators plan ahead, allocate their time, and meet deadlines. Update your schedule when changes are made, and either place the up-to-date schedule in an easily accessible location (for example, on a project website) or send the schedule to each team member. If the team misses a deadline, immediately create a new deadline. Team members should always know when tasks must be completed.
- **Put your decisions in writing.** Writing down your decisions, and communicating them to all collaborators, helps the team remember what happened. In addition, if questions arise, the team can refer easily to the document and, if necessary, update it.
- **Monitor the project.** By regularly tracking the progress of the project, the team can learn what has already been accomplished, whether the project is on schedule, and if any unexpected challenges exist.
- **Distribute and act on information quickly.** Acting fast to get collaborators the information they need helps ensure that the team makes effective decisions and steady progress toward completing the project.
- **Be flexible regarding schedule and responsibilities.** Adjust your plan and methods when new information becomes available or problems arise. When tasks are held up because earlier tasks have been delayed or need reworking, the team should consider revising responsibilities to keep the project moving forward.



## Conducting Meetings

Collaboration involves meetings. Whether you are meeting live in a room or using videoconferencing tools, the five aspects of meetings discussed in this section can help you use your time productively and produce the best possible document.

To watch a tutorial on using helpful online tools to schedule meetings, see the additional resources in LaunchPad.

### LISTENING EFFECTIVELY

Participating in a meeting involves listening and speaking. If you listen carefully to other people, you will understand what they are thinking and you will be able to speak knowledgeably and constructively. Unlike hearing, which involves receiving and processing sound waves, listening involves understanding what the speaker is saying and interpreting the information.

### GUIDELINES Listening Effectively

Follow these five steps to improve your effectiveness as a listener.

- **Pay attention to the speaker.** Look at the speaker, and don't let your mind wander.
- **Listen for main ideas.** Pay attention to phrases that signal important information, such as "What I'm saying is . . ." or "The point I'm trying to make is . . . ."
- **Don't get emotionally involved with the speaker's ideas.** Even if you disagree, continue to listen. Keep an open mind. Don't stop listening in order to plan what you are going to say next.
- **Ask questions to clarify what the speaker said.** After the speaker finishes, ask questions to make sure you understand. For instance, "When you said that each journal recommends different protocols, did you mean that each journal recommends several protocols or that each journal recommends a different protocol?"
- **Provide appropriate feedback.** The most important feedback is to look into the speaker's eyes. You can nod your approval to signal that you understand what he or she is saying. Appropriate feedback helps assure the speaker that he or she is communicating effectively.

### SETTING YOUR TEAM'S AGENDA

It's important to get your team off to a smooth start. In the first meeting, start to define your team's agenda.

### GUIDELINES Setting Your Team's Agenda

Carrying out these eight tasks will help your team work effectively and efficiently.

- **Define the team's task.** Every team member has to agree on the task, the deadline, and the approximate length of the document. You also need to agree on more conceptual points, including the document's audience, purpose, and scope.

(continued)

- **Choose a team leader.** This person serves as the link between the team and management. (In an academic setting, the team leader represents the team in communicating with the instructor.) The team leader also keeps the team on track, leads the meetings, and coordinates communication among team members.
- **Define tasks for each team member.** There are three main ways to divide the tasks: according to technical expertise (for example, one team member, an engineer, is responsible for the information about engineering), according to stages of the writing process (one team member contributes to all stages, whereas another participates only during the planning stage), or according to sections of the document (several team members work on the whole document but others work only on, say, the appendixes). People will likely assume informal roles, too. One person might be good at clarifying what others have said, another at preventing arguments, and another at asking questions that force the team to reevaluate its decisions.
- **Establish working procedures.** Before starting to work, collaborators need answers—in writing, if possible—to the following questions:
  - When and where will we meet?
  - What procedures will we follow in the meetings?
  - What tools will we use to communicate with other team members, including the leader, and how often will we communicate?
- **Establish a procedure for resolving conflict productively.** Disagreements about the project can lead to a better product. Give collaborators a chance to express ideas fully and find areas of agreement, and then resolve the conflict with a vote.
- **Create a style sheet.** A style sheet defines the characteristics of the document's writing style. For instance, a style sheet states how many levels of headings the document will have, whether it will have lists, whether it will have an informal tone (for example, using "you" and contractions), and so forth. If all collaborators draft using a similar writing style, the document will need less revision. And be sure to use styles, as discussed in Chapter 3, to ensure a consistent design for headings and other textual features.
- **Establish a work schedule.** For example, for a proposal to be submitted on February 10, you might aim to complete the outline by January 25, the draft by February 1, and the revision by February 8. These dates are called *milestones*.
- **Create evaluation materials.** Team members have a right to know how their work will be evaluated. In college, students often evaluate themselves and other team members. In the working world, managers are more likely to do the evaluations.

Figure 4.2 shows a work-schedule form. Figure 4.3 on p. 68 shows a team-member evaluation form, and Figure 4.4 on p. 69 shows a self-evaluation form.



**WORK-SCHEDULE FORM**

Name of Project: *VoIP feasibility study*

Principal Reader: *Joan*

Other Readers: *Carlton, Wendy*

Group Members: *Saada, Larry, Randy, Ahmed*

Type of Document Required: *recommendation report*

| Milestones | Responsible Member | Status | Date |
|---|---|---|---|
| Deliver Document | *Saada* | | *May 19* |
| Proofread Document | *all* | | *May 18* |
| Send Document to Print Shop | *n/a* | | *n/a* |
| Complete Revision | *Randy* | | *May 17* |
| Review Draft Elements | *all* | *Done* | *May 16* |
| Assemble Draft | *Ahmed* | *Done* | *May 13* |
| Establish Tasks | *Larry* | *Done* | *May 9* |

| Progress Reports | Responsible Member | Status | Date |
|---|---|---|---|
| Progress Report 3 | *n/a* | | |
| Progress Report 2 | *n/a* | | |
| Progress Report 1 | *Randy* | *Done* | *May 15* |

| Meetings | Agenda | Location | Date | Time |
|---|---|---|---|---|
| Meeting 3 | *Review final draft* | *Room C* | *May 18* | *3:30* |
| Meeting 2 | *Review draft elements* | *Room B* | *May 16* | *2:00* |
| Meeting 1 | *Kickoff meeting* | *Room C* | *May 9* | *3:00* |

**Notes**

**FIGURE 4.2**
Work-Schedule Form

Notice that milestones sometimes are presented in reverse chronological order; the delivery-date milestone, for instance, comes first. On other forms, items are presented in normal chronological order.

The form includes spaces for listing the person responsible for each milestone and progress report and for stating the progress toward each milestone and progress report.

For printable versions of Figs. 4.2, 4.3, and 4.4, see the downloadable forms in LaunchPad.

**FIGURE 4.3**
Team-Member Evaluation Form

## TEAM-MEMBER EVALUATION FORM

Your name: *Mackenzie Hopkins*
Title of the project: *4-wheel-drive feasibility report*
Date: *October 14, 2017*

### Instructions

Use this form to evaluate the other members of your group. Write the name of each group member other than yourself in one of the columns, then assign a score of 0 to 10 (0 being the lowest grade, 10 the highest) to each group member for each criterion. Then total the scores for each member. Because each group member has different strengths and weaknesses, the scores you assign will differ. On the back of this sheet, write any comments you wish to make.

| Criteria | Team Members | | | |
|---|---|---|---|---|
| | *Kurt* | *Amber* | *Bob* | |
| 1. Regularly attends meetings | 1. *10* | 1. *9* | 1. *6* | 1. |
| 2. Is prepared at meetings | 2. *9* | 2. *8* | 2. *5* | 2. |
| 3. Meets deadlines | 3. *9* | 3. *9* | 3. *2* | 3. |
| 4. Contributes good ideas in meetings | 4. *9* | 4. *10* | 4. *9* | 4. |
| 5. Contributes ideas diplomatically | 5. *8* | 5. *9* | 5. *9* | 5. |
| 6. Submits high-quality work | 6. *9* | 6. *9* | 6. *7* | 6. |
| 7. Listens to other members | 7. *8* | 7. *10* | 7. *6* | 7. |
| 8. Shows respect for other members | 8. *9* | 8. *10* | 8. *6* | 8. |
| 9. Helps to reduce conflict | 9. *9* | 9. *10* | 9. *5* | 9. |
| 10. Your overall assessment of this person's contribution | 10. *9* | 10. *9* | 10. *7* | 10. |
| Total Points | *89* | *93* | *62* | |

Mackenzie gives high grades to Kurt and Amber but low grades to Bob. If Kurt and Amber agree with Mackenzie's assessment of Bob's participation, the three of them should meet with Bob to discuss why his participation has been weak and to consider ways for him to improve.



**FIGURE 4.4**
Self-Evaluation Form

## SELF-EVALUATION FORM

Your name: *Lucas Barnes* Date: *April 12, 2017*
Title of the project: *digital-camera study progress report*

### Instructions

On this form, record and evaluate your own involvement in this project. In the Log section, record the activities you performed as an individual and those you performed as part of the team. For all activities, record the date and the number of hours you spent. In the Evaluation section, write two brief statements, one about aspects of your contribution you think were successful and one about aspects you want to improve.

| **Log**<br>Individual Activities | Date | Number of Hours |
|---|---|---|
| *Reviewed proposal and analyzed the Simmons article* | *April 9* | *1.5* |
| *Wrote a draft of the progress report* | *April 10* | *2.5* |
| *Revised a draft of the progress report* | *April 11* | *1* |

| Activities as Part of Team | Date | Number of Hours |
|---|---|---|
| *Met to discuss test research* | *April 10* | *1* |
| *Emailed group and replied to questions about draft* | *April 11* | *2.5* |
| *Met to discuss revision of progress report* | *April 11* | *1.5* |

**Evaluation**

Aspects of My Participation That Were Successful

*I think I did a good job in reviewing the proposal and critiquing the research. I had the draft ready on time, although there were some rough parts in it. I participated effectively in the group meeting about the revision. I think I'm getting a little better about being less sensitive when the team suggests revisions.*

Aspects of My Participation That I Want to Improve in the Future

*I still need to get better at completing my work early enough so I can set it aside before getting it out to the other group members. I get embarrassed when they point out superficial mistakes that I should have caught. I need to practice using styles so that my drafts are easier to incorporate into the group's draft. The other members remembered to use them. I didn't.*

The evaluation section of the form is difficult to fill out, but it can be the most valuable section for you in assessing your skills in collaborating. When you get to the second question, be thoughtful and constructive. Don't merely say that you want to improve your skills in using the software. And don't just write "None."

**ETHICS NOTE**

### PULLING YOUR WEIGHT ON COLLABORATIVE PROJECTS

Collaboration involves an ethical dimension. If you work hard and well, you help the other members of the team. If you don't, you hurt them.

You can't be held responsible for knowing and doing everything, and sometimes unexpected problems arise in other courses or in your private life that prevent you from participating as actively and effectively as you otherwise could. When problems occur, inform the other team members as soon as possible. For instance, call the team leader as soon as you realize you will have to miss a meeting. Be honest about what happened. Suggest ways you might make up for missing a task. If you communicate clearly, the other team members are likely to cooperate with you.

If you are a member of a team that includes someone who is not participating fully, keep records of your attempts to get in touch with that person. When you do make contact, you owe it to that person to try to find out what the problem is and suggest ways to resolve it. Your goal is to treat that person fairly and to help him or her do better work, so that the team will function more smoothly and more effectively.

## CONDUCTING EFFICIENT MEETINGS

Human communication is largely nonverbal. That is, although people communicate through words and through the tone, rate, and volume of their speech, they also communicate through body language. For this reason, meetings provide the most information about what a person is thinking and feeling—and the best opportunity for team members to understand one another.

To help make meetings effective and efficient, team members should arrive on time and stick to the agenda. One team member should serve as secretary, recording the important decisions made at the meeting. At the end of the meeting, the team leader should summarize the team's accomplishments and state the tasks each team member is to perform before the next meeting. If possible, the secretary should give each team member this informal set of meeting minutes.

*For a discussion of meeting minutes, see Ch. 17, p. 467.*

## COMMUNICATING DIPLOMATICALLY

Because collaborating can be stressful, it can lead to interpersonal conflict. People can become frustrated and angry with one another because of personality clashes or because of disputes about the project. If the project is to succeed, however, team members have to work together productively. When you speak in a team meeting, you want to appear helpful, not critical or overbearing.

## CRITIQUING A TEAM MEMBER'S WORK

In your college classes, you probably have critiqued other students' writing. In the workplace, you will do the same sort of critiquing of notes and drafts written by other team members. Knowing how to do it without offending the writer is a valuable skill.



### GUIDELINES Communicating Diplomatically

These seven suggestions for communicating diplomatically will help you communicate effectively.

- **Listen carefully, without interrupting.** See the Guidelines box on page 65.
- **Give everyone a chance to speak.** Don't dominate the discussion.
- **Avoid personal remarks and insults.** Be tolerant and respectful of other people's views and working methods. Doing so is right—and smart: if you anger people, they will go out of their way to oppose you.
- **Don't overstate your position.** A modest qualifier such as "I think" or "it seems to me" is an effective signal to your listeners that you realize that everyone might not share your views.

  OVERBEARING My plan is a sure thing; there's no way we're not going to kill Allied next quarter.

  DIPLOMATIC I think this plan has a good chance of success: we're playing off our strengths and Allied's weaknesses.

  Note that in the diplomatic version, the speaker says "this plan," not "my plan."
- **Don't get emotionally attached to your own ideas.** When people oppose you, try to understand why. Digging in is usually unwise—unless it's a matter of principle—because, although it's possible that you are right and everyone else is wrong, it's not likely.
- **Ask pertinent questions.** Bright people ask questions to understand what they hear and to connect it to other ideas. Asking questions also encourages other team members to examine what they hear.
- **Pay attention to nonverbal communication.** Bob might *say* that he understands a point, but his facial expression might show that he doesn't. If a team member looks confused, ask him or her about it. A direct question is likely to elicit a statement that will help the team clarify its discussion.

### GUIDELINES Critiquing a Colleague's Work

Most people are very sensitive about their writing. Following these three suggestions for critiquing writing will increase the chances that your colleague will consider your ideas positively.

- **Start with a positive comment.** Even if the work is weak, say, "You've obviously put a lot of work into this, Joanne. Thanks." Or, "This is a really good start. Thanks, Joanne."
- **Discuss the larger issues first.** Begin with the big issues, such as organization, development, logic, design, and graphics. Then work on smaller issues, such as paragraph development, sentence-level matters, and word choice. Leave editing and proofreading until the end of the process.

*(continued)*

- **Talk about the document, not the writer.**

RUDE You don't explain clearly why this criterion is relevant.

BETTER I'm having trouble understanding how this criterion relates to the topic.

Your goal is to improve the quality of the document you will submit, not to evaluate the writer or the draft. Offer constructive suggestions.

RUDE Why didn't you include the price comparisons here, as you said you would?

BETTER I wonder if the report would be stronger if we included the price comparisons here.

In the better version, the speaker focuses on the goal (to create an effective report) rather than on the writer's draft. Also, the speaker qualifies his recommendation by saying, "I wonder if . . . ." This approach sounds constructive rather than boastful or annoyed.

## DOCUMENT ANALYSIS ACTIVITY

### Critiquing a Draft Clearly and Diplomatically

This is an excerpt from the methods section of a report about computer servers. In this section, the writer is explaining the tasks he performed in analyzing different servers. In a later section, he explains what he learned from the analysis. The comments in the balloons were inserted into the document by the author's colleague.

The questions in the margin ask you to think about techniques for critiquing (as outlined on page 71).

1. What is the tone of the comments? How can they be improved?
2. How well does the collaborator address the larger issues?
3. How well does the collaborator address the writing, not the writer?
4. How well do the collaborator's comments focus on the goal of the document, rather than judging the quality of the writing?

The first task of the on-site evaluations was to set up and configure each server. We noted the relative complexity of setting up each system to our network.

**Comment:** Huh? What exactly does this mean?

After we had the system configured, we performed a set of routine maintenance tasks: add a new memory module, swap a hard drive, swap a power supply, and perform system diagnostics.

**Comment:** Okay, good. Maybe we should explain why we chose these tests.

We recorded the time and relative difficulty of each task. Also, we tried to gather a qualitative feeling for how much effort would be involved in the day-to-day maintenance of the systems.

**Comment:** What kind of scale are you using? If we don't explain it, it's basically useless.

**Comment:** Same question as above.

After each system was set up, we completed the maintenance evaluations and began the benchmark testing. We ran the complete WinBench and NetBench test suites on each system. We chose several of the key factors from these tests for comparison.

**Comment:** Will readers know these are the right tests? Should we explain?



## TECH TIP

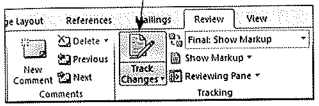
### *Why* To Use Reviewing Tools

Technical communicators rarely work alone. They typically collaborate with others on a team, giving and receiving feedback on documents, often with electronic reviewing tools. Electronic reviewing tools allow teams to exchange feedback, written and visual, in the documents themselves, determine who has provided what feedback, retain previous versions of documents, specify who can change the original documents, and more. Google, Microsoft, and Adobe, among others, have developed programs and features that allow users to work efficiently in these situations, enabling control over reviewing processes.

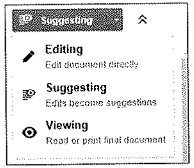
### *How* To Use Reviewing Tools

Some programs require you to turn on the **Review** function (called "Track Changes" in Microsoft Word and "Suggesting" in Google Docs) in order to **track the changes** you make on a document as you type. In Adobe Acrobat, you need to work with the **Select** tool.

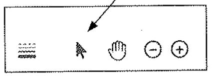
**Microsoft Word**




**Google Docs**

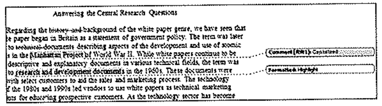



**Adobe Acrobat**

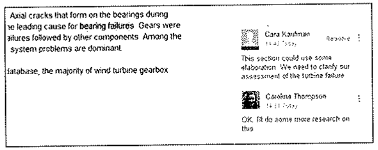


You can insert **comments** (or "Sticky Notes" in Adobe Acrobat) in places where you want to ask questions or provide further information without disrupting the text. You can also use the **highlight** feature to emphasize words and passages. And you can **reply to** or **resolve** others' comments.

**Commenting with Microsoft Word**

**Replying with Google Docs**

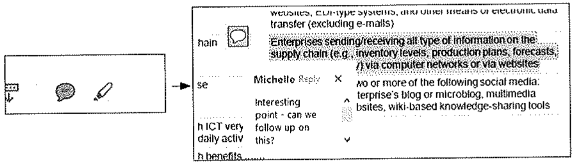



*(continued)*

**TECH TIP**

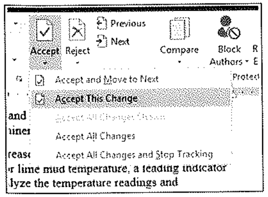
*How* To Use Reviewing Tools (*continued*)

**Highlighting and Commenting with Adobe Acrobat**

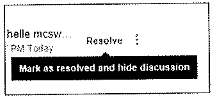



You can review the tracked changes and comments of others, accepting or rejecting their changes. If you are not the owner of the document, make sure the owner has authorized you to **accept**, **reject**, **resolve**, **undo**, or **delete** the changes of others. If you are unsure, insert a note indicating any places you make changes that might otherwise go unnoticed.

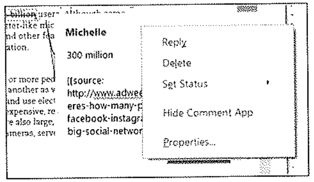
**Microsoft Word**




**Google Docs**




**Adobe Acrobat**




## Using Social Media and Other Electronic Tools in Collaboration

Professionals use many types of electronic tools to exchange information and ideas as they collaborate. The following discussion highlights the major technologies that enable collaboration: word-processing tools, messaging technologies, videoconferencing, wikis and shared document workspaces, and virtual worlds.

### WORD-PROCESSING TOOLS

To watch a tutorial on using the commenting features in Word, Adobe Acrobat, and Google Drive, see the additional resources in LaunchPad.

To watch a tutorial on incorporating tracked changes, see the additional resources in LaunchPad.

Most word processors offer three powerful features that you will find useful in collaborative work:

- The *comment feature* lets readers add electronic comments to a file.
- The *revision feature* lets readers mark up a text by deleting, revising, and adding words and indicates who made which suggested changes.
- The *highlighting feature* lets readers use one of about a dozen "highlighting pens" to call the writer's attention to a particular passage.



### MESSAGING TECHNOLOGIES

Two messaging technologies that have been around for decades are instant messaging and email. *Instant messaging (IM)* is real-time, text-based communication between two or more people. In the working world, IM enables people in different locations to communicate textual information at the same time. *Email* is an asynchronous medium for sending brief textual messages and for transferring files such as documents, spreadsheets, images, and videos.

*For more about writing email, see Ch. 14, p. 378.*

For use on mobile devices such as phones, the two most popular messaging technologies are text messaging and microblogging.

*Text messaging* enables people to use mobile devices to send messages that can include text, audio, images, and video. Texting is the fastest-growing technology for exchanging messages electronically because most people keep their phones nearby. Organizations use text messaging for such purposes as sending a quick update or alerting people that an item has been delivered or a task completed. On your campus, the administration might use a texting system to remind students of an upcoming registration deadline or to alert people about a campus emergency.

*Microblogging* is a way of sending very brief textual messages to your personal network. You probably use the world's most popular microblog, Twitter, which now has more than 300 million users (SocialTimes, 2016). Although some organizations use Twitter, many use Twitter-like microblogs such as Yammer, which includes a search function and other features and which can be administered from within an organization.

### VIDEOCONFERENCING

Videoconferencing technology allows two or more people at different locations to simultaneously see and hear one another as well as exchange documents, share data on computer displays, and use electronic whiteboards. Systems such as Skype are simple and inexpensive, requiring only a webcam and some free software. However, there are also large, dedicated systems that require extensive electronics, including cameras, servers, and a fiber-optic network or high-speed telephone lines. Figure 4.5 shows a videoconference in progress.

To watch a tutorial on using videoconferencing software to conduct online meetings, see the additional resources in LaunchPad.

**GUIDELINES** Participating in a Videoconference

Follow these six suggestions for participating effectively in a videoconference.

- **Practice using the technology.** For many people, being on camera is uncomfortable, especially the first time. Before participating in a high-stakes videoconference, become accustomed to the camera by participating in a few informal videoconferences.

(*continued*)

**FIGURE 4.5 A Videoconference**

*Videoconferencing systems range from sophisticated ones like this to inexpensive cameras attached to individual workstations to systems that work on smartphones. Most videoconferencing systems can display more than one window to accommodate several sets of participants.*

Courtesy of Cisco Systems, Inc.

- **Arrange for tech support at each site.** Participants can quickly become impatient or lose interest when someone is fumbling to make the technology work. Each site should have a person who can set up the equipment and troubleshoot if problems arise.
- **Organize the room to encourage participation.** If there is more than one person at the site, arrange the chairs so that they face the monitor and camera. Each person should be near a microphone. Before beginning the conference, check that each location has adequate audio and video as well as access to other relevant technology such as computer monitors. Finally, remember to introduce everyone in the room, even those off camera, to everyone participating in the conference.
- **Make eye contact with the camera.** Eye contact is an important element of establishing your professional persona. The physical setup of some videoconferencing systems means you will likely spend most of your time looking at your monitor and not directly into the camera. However, this might give your viewers the impression that you are avoiding eye contact. Make a conscious effort periodically to look directly into the camera when speaking.
- **Dress as you would for a face-to-face meeting.** Wearing inappropriate clothing can distract participants and damage your credibility.
- **Minimize distracting noises and movements.** Sensitive microphones can magnify the sound of shuffling papers, fingers tapping on tables, and whispering. Likewise, depending on your position in the picture frame, excessive movements can be distracting.

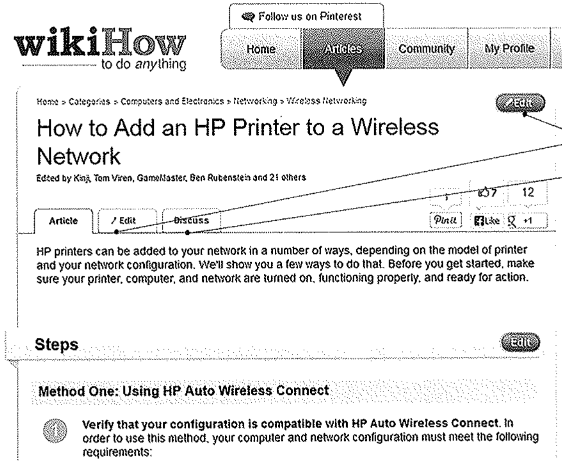


## WIKIS AND SHARED DOCUMENT WORKSPACES

Ten years ago, people would collaborate on a document by using email to send it from one person to another. One person would write or assemble the document and then send it to another person, who would revise it and send it along to the next person, and so forth. Although the process was effective, it was inefficient: only one person could work on the document at any given moment. Today, two new technologies—wikis and shared document workspaces—make collaborating on a document much simpler and more convenient.

A *wiki* is a web-based document that authorized users can write and edit. The best-known wiki is Wikipedia, an online encyclopedia that contains some four million articles written and edited by people around the world. In the working world, people use software such as Jive and Socialtext to host wikis used for creating many kinds of documents, such as instructions, manuals, lists of frequently asked questions, and policy documents. For instance, many organizations create their policies on using social media by setting up wikis and inviting employees to write and edit what others have written. The concept is that a wiki draws on the expertise and insights of people throughout the organization and, sometimes, outside the organization. Figure 4.6 shows a portion of a wiki.

To watch a tutorial on using wikis for collaborative work, see the additional resources in LaunchPad.




This portion of a screen from wikiHow shows an excerpt from an article about how to add an HP printer to a wireless network. Users can click on the Edit tab or Edit buttons to edit the article and on the Discuss tab to post questions and answers.

**FIGURE 4.6 A Wiki**

Information from WikiHow, 2013: www.wikihow.com/Add-an-HP-Printer-to-a-Wireless-Network.

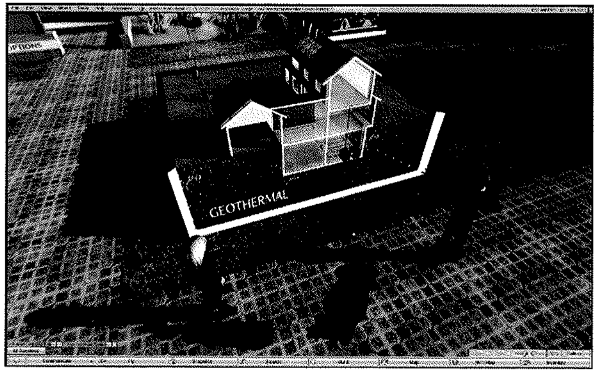
To watch a tutorial on using collaboration software, see the additional resources in LaunchPad.

A *shared document workspace* makes it convenient for a team of users to edit a file, such as a Prezi or PowerPoint slide set or a Word document. A shared document workspace such as Microsoft SharePoint or Google Drive archives all the revisions made by each of the team members, so that the team can create a single document that incorporates selected revisions. Some shared document workspaces enable a user to download the document, revise it on his or her computer, and then upload it again. This feature is extremely convenient because the user does not need to be connected to the Internet to work on the document.

## VIRTUAL WORLDS

Organizations are using virtual worlds, such as Second Life, to conduct meetings and conferences. Participants create avatars and visit different locations in the virtual world to view displays, watch product demonstrations, hold meetings, participate in job interviews, and talk with others. Many people think that entering a three-dimensional virtual world, in which you can talk with others through a headset connected to a computer, creates a more realistic experience than merely visiting a website, watching a video, or talking on the phone. Companies such as IBM, Cisco, and Intel use virtual worlds such as Second Life and Open Sim for day-to-day activities and special events. Holding a conference for 200 employees on Second Life saved IBM some $320,000 in transportation, food, and lodging expenses (Martin, 2012). Figure 4.7 shows how one company uses a virtual world to display a product.

Although this section has discussed various collaboration tools as separate technologies, software companies are bundling programs in commercial




Avatars of prospective customers are examining a model created by a design firm. The avatars can walk around and view the model from any perspective. The design firm even has full-scale models of houses. Avatars can enter a house, examine the interior, and then sit down in a virtual room with the firm's representatives to discuss the design. The firm can change the design in real time in response to customers' questions and suggestions.

**FIGURE 4.7 A Virtual World**
Reprinted by permission of Brouchoud Crescendo Design.



products such as IBM Sametime, Adobe Creative Cloud, and Skype for Business, which are suites of voice, data, and video services. These services usually share four characteristics:

- **They are cloud based.** That is, organizations lease the services and access them over the Internet. They do not have to acquire and maintain special hardware. This model is sometimes called *software as a service*.
- **They are integrated across desktop and mobile devices.** Because employees can access these services from their desktops or mobile devices, they are free to collaborate in real time even if they are not at their desks. Some services provide *presence awareness*, the ability to determine a person's online status, availability, and geographic location.
- **They are customizable.** Organizations can choose whichever services they wish and then customize them to work effectively with the rest of the organization's electronic infrastructure, such as computer software and telephone systems.
- **They are secure.** Organizations store the software behind a firewall, providing security: only authorized employees have access to the services.

**ETHICS NOTE**

## MAINTAINING A PROFESSIONAL PRESENCE ONLINE

According to a report from Cisco Systems (2010), half of the surveyed employees claim to routinely ignore company guidelines that prohibit the use of social media for non-work-related activities during company time. If you use your organization's social media at work, be sure to act professionally so that your actions reflect positively on you and your organization. Be aware of several important legal and ethical issues related to social media.

*For more about maintaining a professional presence online, see Ch. 2, p. 34.*

Although the law has not always kept pace with recent technological innovations, a few things are clear. You and your organization can be held liable if you make defamatory statements (statements that are untrue and damaging) about people or organizations, publish private information (such as trade secrets) or something that publicly places an individual "in a false light," publish personnel information, harass others, or participate in criminal activity.

In addition, follow these guidelines to avoid important ethical pitfalls:

- Don't waste company time using social media for nonbusiness purposes. You owe your employer diligence (hard work).
- Don't divulge secure information, such as a login and password that expose your organization to unauthorized access, and don't reveal information about products that have not yet been released.
- Don't divulge private information about anyone. Private information relates to such issues as religion, politics, and sexual orientation.
- Don't make racist or sexist comments or post pictures of people drinking.

If your organization has a written policy on the use of social media, study it carefully. Ask questions if anything in it is unclear. If the policy is incomplete, work to make it complete. If there is no policy, work to create one.

For an excellent discussion of legal and ethical aspects of using your organization's social media, see Kaupins and Park (2010).

## Gender and Collaboration

Effective collaboration involves two related challenges: maintaining the team as a productive, friendly working unit and accomplishing the task. Scholars of gender and collaboration see these two challenges as representing the feminine and the masculine perspectives.

This discussion should begin with a qualifier: in discussing gender, we are generalizing. The differences in behavior between two men or between two women are likely to be greater than the differences between men and women in general.

The differences in how the genders communicate and work in teams have been traced to every culture's traditional family structure. Because women were traditionally the primary caregivers in American culture, they learned to value nurturing, connection, growth, and cooperation; because men were the primary breadwinners, they learned to value separateness, competition, debate, and even conflict (Karten, 2002). In collaborative teams, women appear to value consensus and relationships more than men do, to show more empathy, and to demonstrate superior listening skills. Women talk more about topics unrelated to the task (Duin, Jorn, & DeBower, 1991), but this talk is central to maintaining team coherence. Men appear to be more competitive than women and more likely to assume leadership roles. Scholars of gender recommend that all professionals strive to achieve an androgynous mix of the skills and aptitudes commonly associated with both women and men.

## Culture and Collaboration

*For more about multicultural issues, see Ch. 5, p. 96.*

Most collaborative teams in industry and in the classroom include people from other cultures. The challenge for all team members is to understand the ways in which cultural differences can affect team behavior. People from other cultures

- might find it difficult to assert themselves in collaborative teams
- might be unwilling to respond with a definite "no"
- might be reluctant to admit when they are confused or to ask for clarification
- might avoid criticizing others
- might avoid initiating new tasks or performing creatively

Even the most benign gesture of friendship on the part of a U.S. student can cause confusion. If a U.S. student casually asks a Japanese student about her major and the courses she is taking, the Japanese student might find the question too personal—yet she might consider it perfectly appropriate to talk about her family and her religious beliefs (Lustig & Koester, 2012). Therefore, you should remain open to encounters with people from other cultures without jumping to conclusions about what their actions might or might not mean.



## WRITER'S CHECKLIST

In managing your project, did you
- ☐ break it down into several smaller tasks if it was large? *(p. 64)*
- ☐ create a plan? *(p. 64)*
- ☐ create and maintain an accurate schedule? *(p. 64)*
- ☐ put your decisions in writing? *(p. 64)*
- ☐ monitor progress? *(p. 64)*
- ☐ distribute and act on information quickly? *(p. 64)*
- ☐ act flexibly regarding schedule and responsibilities? *(p. 64)*

At your first team meeting, did you
- ☐ define the team's task? *(p. 65)*
- ☐ choose a team leader? *(p. 65)*
- ☐ define tasks for each team member? *(p. 65)*
- ☐ establish working procedures? *(p. 65)*
- ☐ establish a procedure for resolving conflict productively? *(p. 65)*
- ☐ create a style sheet? *(p. 65)*
- ☐ establish a work schedule? *(p. 65)*
- ☐ create evaluation materials? *(p. 65)*

To help make meetings efficient, do you
- ☐ arrive on time? *(p. 70)*
- ☐ stick to the agenda? *(p. 70)*
- ☐ make sure that a team member records important decisions made at the meeting? *(p. 70)*
- ☐ make sure that the leader summarizes the team's accomplishments and that every member understands what his or her tasks are? *(p. 70)*

To communicate diplomatically, do you
- ☐ listen carefully, without interrupting? *(p. 71)*
- ☐ give everyone a chance to speak? *(p. 71)*
- ☐ avoid personal remarks and insults? *(p. 71)*
- ☐ avoid overstating your position? *(p. 71)*
- ☐ avoid getting emotionally attached to your own ideas? *(p. 71)*
- ☐ ask pertinent questions? *(p. 71)*
- ☐ pay attention to nonverbal communication? *(p. 71)*

In critiquing a team member's work, do you
- ☐ start with a positive comment? *(p. 71)*
- ☐ discuss the larger issues first? *(p. 71)*
- ☐ talk about the document, not the writer? *(p. 72)*
- ☐ use the comment, revision, and highlighting features of your word processor, if appropriate? *(p. 74)*

When you participate in a videoconference, do you
- ☐ first practice using videoconferencing technology? *(p. 75)*
- ☐ arrange for tech support at each site? *(p. 76)*
- ☐ organize the room to encourage participation? *(p. 76)*
- ☐ make eye contact with the camera? *(p. 76)*
- ☐ dress as you would for a face-to-face meeting? *(p. 76)*
- ☐ minimize distracting noises and movements? *(p. 76)*

## EXERCISES

*For more about memos, see Ch. 14, p. 376.*

1. Experiment with the comment, revision, and highlighting features of your word processor. Using online help if necessary, learn how to make, revise, and delete comments; make, undo, and accept revisions; and add and delete highlights.
2. Locate free videoconferencing software on the Internet. Download the software, and install it on your computer at home. Learn how to use the feature that lets you send attached files.
3. Using a wiki site such as wikiHow.com, find a set of instructions on a technical process that interests you. Study one of the revisions to the instructions, noting the types of changes made. Do the changes relate to the content of the instructions, to the use of graphics, or to the correctness of the writing? Be prepared to share your findings with the class.
4. Sign up for a free account on Second Life. Choose an avatar, learn how to navigate on the site, and see whether your university has any academic offerings on