STEP

1 | Analyze Purpose and Audience

To start planning your document, answer six questions in order as you analyze purpose and audience. Treat each question as a necessary technique. One question is about you, the writer: What result do you want? Five questions are about your audience. If you can't answer the following six analytical questions, you can't write a successful document:

1.1 What result do you want from the document?
1.2 Who is the audience?
1.3 What does the audience do with the information?
1.4 What information does the audience need?
1.5 Does the audience know little or much about the information?
1.6 Does the audience need proof?

For recent college graduates entering the workplace, analysis is key to making the transition between academic essays and results-oriented documents. In school, you pay other people to read your documents. Now that you are out of school, you want other people to pay you to write documents. They are not going to read your documents or pay you unless your documents have value for them. These six techniques ensure that your documents provide value to your reader.

Analysis of your purpose and the audience helps you make important decisions about the document. You decide the type of document to write. You manage the tone of your document—neutral to authoritative. You identify the information the audience needs to achieve its purpose, and consequently you

know what is relevant. What the audience does with the information provides clues on how best to organize the document. If the audience knows little about the information, you need to write a longer document—often twice as long. If the audience needs proof, you need to write a longer document including more supporting facts.

For some complex documents, you may have more than one audience. If you have more than one audience, you need to analyze each separately. We provide examples of multiple audiences in this step. Each has a different purpose; each needs different information. One audience knows a little while the other knows much. One audience needs proof while the other does not. Later, you write to each separately, either in separate documents or in separate sections within a document. If you have more than one audience, add a seventh technique:

1.7 Plan how to write to multiple audiences.

1.1 What Result Do You Want from the Document?

When we ask writers what *result* they want from their document, we usually get answers like, "I want to inform . . . explain . . . describe. . . ." Okay, but *why* do you want to *inform, explain*, or *describe*? What *result* do you want?

Result? Some writers think self-interest is wrong—as if wanting a result is impolite. If the result is good, what is wrong with wanting it? The job seeker wants the satisfying job. The contracting officer wants the best value at the least risk. The sales staff wants to sell their goods and services. Staff experts want managers to accept their recommendations. Managers want their plans and decisions implemented.

Most successful business relationships occur when two parties participate in an activity that helps both get the result each wants. Likewise, documents succeed when the document helps the writer and reader both get the result each wants.

Therefore, know what result you want, and don't be altruistic. *My company wants to inform the client of a new upgrade* is altruistic. Instead, identify what result you want from the document: *We want the client to buy the new hardware upgrade from us.*

Subject matter experts often focus on subject matter instead of what result they want: *My purpose is to explain the functions of the new billing system.* Why are you explaining the functions? Instead, focus on the result you achieve with your explanation: *I want the client to approve the billing system functions, so my technical staff can develop a detailed design.*

Never vent feelings: *I'm expressing my outrage at the unauthorized charge on my credit card account.* So what if you're outraged? Instead, focus on the result you want: *I want the credit card company to remove the unauthorized charge from my account.*

Be sure to limit the result you expect from any specific document. For example, you want a job that you see advertised. So you submit your resume with a cover letter. Don't write, *Please review my resume and send me a job offer.* The purpose of the cover letter is simply to inform the company that you are applying and to encourage them to read your resume. The purpose of your resume is to get an interview. The purpose of the interview is to get a job offer.

The result you want from the document affects the kind of document you choose, such as e-mail, letter, report, or proposal. *The result you want* also affects your tone, such as formal, informal, warm, or firm.

If you write for someone else's signature—your boss' perhaps—ensure that you know what result the boss wants from the document. Don't guess.

1.2 Who Is the Audience?

Having decided what you want from the document, turn your attention to the audience. First, answer this question: *Who is the*

audience? The audience is whoever *uses* the document's information to do something. Your audience can be a single reader or a group of readers with similar needs. If you misidentify the audience, your document is a failure from the start.

If you don't know who uses the information, don't guess: Ask.

Organization charts do not determine your audience. Organization charts may determine how you route your communication, but not necessarily who uses it. For example, you work in the U.S. Patent and Trademark Office. You get a letter from Senator Smith asking you to explain how his constituent, Mr. Jones, can get an extension on a patent. A copy of Mr. Jones' letter is attached. Protocol dictates that you reply to the senator, but you need to direct the information to Mr. Jones, who uses the information. For example, *Dear Senator Smith: This letter explains how your constituent Mr. Jones can apply for an extension for his patent. . . .*

Therefore, do not assume that your boss is the audience. Often, the boss does not use the information. Rather, the boss provides quality control for your document.

Be specific when identifying your audience. For example, you are the office manager of Temps & Co., a temporary employment agency. You write a policy that begins, *This policy describes our company benefits for employees. . . .* In this case, the audience *employees* is too general. Instead, write, *This policy describes our company benefits for full-time employees.* By being specific, you avoid making trouble for yourself and your temporary employees, who cannot use the information in the document.

A document may have more than one audience. For example, technical manuals often have multiple audiences: The user reads the manual to use the tool, while the technician uses the manual to maintain the tool. When writing a large proposal, you often have multiple audiences: users, contract officers, budget specialists, and

legal staff. Staff studies often have two audiences: the managers who decide and the experts who advise managers what to decide.

Remember, if you have multiple audiences, you must analyze each separately. Later in technique 1.7, you plan how to accommodate each audience with separate documents or sections.

1.3 What Does the Audience Do with the Information?

To analyze each audience, begin by answering the question: *What does the audience do with the information?* What the audience does with the information is the most important piece of the analysis. Be specific with your answer. Think past the obvious, "The audience reads and evaluates. . . ." Exactly *what do they do* with the information that they read and evaluate?

If you don't know what the audience does with the information in your document, don't guess: find out. Everything in your document is relevant only to the extent that it helps the audience do whatever they need to do. If you don't know what they do with the information, you cannot possibly know what information they need.

In general, readers do three things with information:

1. Advise others
2. Decide, which includes plan, budget, and manage
3. Follow instructions to perform tasks

Consider, for example, information about wireless computer networks. A company's technology expert uses technical information to advise management about choosing a wireless network. A manager uses information about the costs and benefits to decide

whether to convert to a wireless network. Employees use *how to* information to share files on the wireless network.

How people use information is independent of job titles and education. Every person at every level gives advice, makes decisions, and follows instructions.

Don't waste time writing a document that lacks purpose. If the reader doesn't see the purpose, then your document is by default an FYI (for your information) document. How do readers react to FYI documents? When you sort through your e-mails, what do you do when you suspect an e-mail is just FYI? If you are like most busy people, you hit the delete key so fast that you approach the speed of light. Serious people ignore purposeless FYI documents.

Avoid vague descriptions of the audience's purpose:

This brochure helps students understand the enrollment process.
   (*vague*)
This brochure tells the student how to enroll for summer classes.
   (*specific*)

Remember, if you have multiple audiences, determine what each does with the document. For example, you work for a drug company, writing text about a new drug for your company web site. You have two audiences: the public and physicians. The public reads the text so they can consult their physicians. Physicians read so they can safely prescribe the drug.

1.4 What Information Does the Audience Need?

What the audience *does* with the information determines what information they *need*. Do not tell them everything you know, just what they need.

We must contrast writing in school and writing in the workplace. In school we learned *more is better.* We tried to impress the teacher with how much we knew about the subject. In fact, we earned better grades when we demonstrated the breadth of our knowledge. However, in the workplace, readers do not care how much we know unless that knowledge helps them do something. In school, we learned, *if you can't answer the question, answer a question you can.* That strategy is reasonable when taking a test. However, in the workplace, when we can't answer the question, the smart response is, *I don't know. I will find an answer.*

Much of the value you, as a subject-matter expert, provide the audience is your ability to select the necessary information from the vast store of unnecessary information. Usually the audience needs to know a small subset of what you know about the subject. They just want the information they need to accomplish some particular purpose. Everything else you know about the subject is irrelevant in the document.

Imagine that you are the inventor of a ceramic paint that lasts 30 years. You proved scientifically that your paint works. Now you need to raise capital to build a manufacturing plant. You prepare a briefing to present your promising technology to Venture Capital Inc., who can raise the capital you need. Venture Capital does not need to know how you make your paint. Moreover, they don't really care how you make your paint. They need to know the capital required, the potential return on investment, the schedule of payback, and the risks.

If you don't know whether the audience needs to know something, ask them.

If you have multiple audiences who do different things with the information, you can be certain they need different information.

1.5 Does the Audience Know Little or Much About the Information?

Citing *only* what information the audience needs, answer the question: *Does the audience know little or much about the information?*

For example, you write a staff study comparing *the cost to lease or buy* a Cessna Citation CJ2 2000 corporate jet, so your company treasurer can present the idea to the board of directors. The treasurer knows next to nothing about jets, but she doesn't need information about jets. Rather, she needs information about leasing and buying. Therefore, she knows much. On the other hand, if the company pilot reads the same document, he knows little: He knows much about jet aircraft but not finance.

If the audience knows much about the information, you can use technical language, even jargon. If the audience knows little, you help them in four ways:

1. Define words.
2. Give examples.
3. Provide analogies.
4. Draw pictures.

You might think your audience is halfway between knowing little and much—indeed, most people are between. Nevertheless, you need to pick *little* or *much* because you can't give *half*-definitions, *half*-examples, *half*-analogies, or *half*-pictures.

The audience who knows little *always* gets a longer document, often two to three times longer than the same document written to an audience who knows much. Use this valuable insight to help you estimate the time for any writing task.

If you don't know if the audience knows little or much, ask if they want you to define words, give examples, or provide analogies

and pictures. If you can't ask and must guess, always guess that the audience knows much. You get in as much or more trouble for writing a document too long as writing a document too short. First, you spend two to three times the labor hours writing the long document—time you cannot get back. Second, managers resent reading long documents written beneath them, and they rightly assume that they are paying more for a long document when they want a less expensive short document. The wiser approach is to send the short document written for the audience who knows much. Let the manager ask you for the longer version.

Whether the audience knows little or much about the subject affects the type of document you choose, the length of the document, and your word choice.

1.6 Does the Audience Need Proof?

Based only on what the audience needs to know, answer the question: *Does the audience need proof?* If they need proof, you need to include more supporting facts.

Don't assume that you must prove everything. People hire experts for their expert advice, not for their detailed proofs.

The audience who needs proof always gets a longer document, because they need more supporting details. Use this valuable insight to help you budget your time for any writing task.

If you don't know whether the audience needs proof, ask. If you can't ask, always assume the audience believes you. You save time. Moreover, managers under time-pressure to make a decision resent experts who force them to read detailed proofs. Software users who want simple instructions groan when the manual explains the clever design and engineering subtleties in the software.

Sometimes the audience who wants proof won't understand the proof. A common scenario involves the manager who needs to

know the business impact (the effect) of a decision. Also, the manager wants proof. Unfortunately, the proof is usually in the science or technology (the cause).

For example, a sales manager wants to decide whether investing in an interactive web site can improve customer service. He needs information about costs, benefits to his customers and sales staff, and reliability. He is skeptical about *machines* interacting with his customers, so he wants proof. The proof is in a detailed discussion of computer science: hardware, software, and communications. The sales manager knows almost nothing about computer science; however, the company has a computer expert on staff. Writing the proof to the sales manager is a waste of time.

Therefore, write about web-based customer support in two parts—one part to each audience. Write about the business impact (the effect) to the sales manager who makes the decision. Write about the technical proof (the cause) to the computer expert who advises the sales manager.

Whether the audience needs proof affects the type of document you choose, amount of supporting detail, and tone.

1.7 Plan How to Write to Multiple Audiences.

If you discover that your document has more than one audience, apply this seventh technique: Plan how to write to your multiple audiences. You must write to each separately. You cannot write to different audiences in the same body of a document.

Audiences have different—*usually incompatible*—needs. The manager and the staff expert read for different reasons. They need different information. They know much about their own jobs and perhaps little about the other's job. They may have different

requirements for proof. Conversely, if readers share the same reason for reading, need the same information, have the same level of knowledge and requirements for proof—they are actually just one audience.

Use any combination of these three ways to separate information for different audiences:

1. Write separate documents.
2. Break your document into sections, each serving a different audience.
3. Use transmittal letters, summaries, abstracts, appendices, attachments, exhibits, notes, and glossaries for different audiences.

How you separate the information for the audiences is judgment. For example, you use separate documents when you prefer that the audiences not see each other's information. You use sections when the different audiences need access to each other's information. If you use sections for each audience, each section has its own introduction, body, and conclusion. Use transmittal letters, summaries, and abstracts to help readers who might not want to read the entire document. Use the appendices, attachments, exhibits, notes, glossaries, and indexes after the main document to help readers who need supplementary information. Notes can also appear at the bottom of the pages or in shadow boxes in the main document.

For example, if your primary audience is a technical expert, write the document using jargon and theory, but add an executive summary for the manager and a glossary for the less technical audience. However, if your primary audience is the manager who has a general knowledge of the subject, put the technical details, jargon, and theory in an appendix for the staff experts.

Sometimes one audience knows little and another knows much about the information in the document. A typical example is a user manual where some users already know much about the system and others know little. You accommodate each by writing the thorough step-by-step manual with pictures for the audience who knows little; then add a quick reference guide as an appendix for the audience who knows much.