

UNIT 5: ORGANIZING THOUGHTS AND RESOURCES

OVERVIEW

In this unit, we discuss ways you can organize your writing and that of others using such techniques as outlining, brainstorming, and devising thesis paragraphs. Our discussion will include methods for organizing that are based in technology, such as word processing and automated publishing packages as well as database-supported organizing programs.

Our major goal is to acquaint you with different ways for organizing information and for determining the best approach for the particular situation. You will learn strategies that will provide you with a variety of inroads into the information and with the appropriate strategy to fit your audience type.

OBJECTIVES

After completing this unit, you should be able to:

- create a subject and sentence outline
- write a thesis statement
- discuss four major strategies for organizing information other than thesis and outline and mention at least one writing situation that might call for each strategy
- organize the same information in three different ways, including for online display
- evaluate the effectiveness of organizing strategies in two sample business documents

DISCUSSION

WHY ORGANIZE THOUGHTS AND RESOURCES?

Your thoughts are the driving force behind most of the writing that you do. Your resources are what you have at your disposal to complete that writing. Together, these components can single-handedly make a writing project succeed or fail. As adults, most of us think that our thoughts are organized, and many of us find that our ability to organize, select, evaluate, and recall information and ideas surpasses that of others. Similarly, if we are managers, we pride ourselves on being able to manage the resources at our disposal. Certainly, this can include writing resources as well. So, why do we need to organize what we think and how we write?

As writers, we need to organize our thoughts and resources precisely because we do not want sole ownership of them for eternity. As writers, we deliberately seek to share our thoughts with others and to expose our thoughts to the demands for organization that other people impose. We marshal resources to complete writing projects so that we can express our thoughts fully, and in language that people will understand and believe. Because few thought patterns are alike, human beings tailor their writing by organizing their ideas to make them interesting, acceptable, or persuasive to others.

Organizational schemes that we use for our writing should be easily recognized by others—patterns that are seen in the work of other writers or patterns familiar to us from everyday life. If someone asked you to present a report on the contents of your desktop, for example, you might decide to describe the contents working from left to right, right to left, top to bottom, or bottom to top. You might also decide to categorize the items on the desk by name, by how frequently they are used, by color, by when you acquired them, or by any other number of logical groupings. Unless you tell your readers about how you will organize and present the description, they will most likely expect some predictable method of organizing, perhaps one that they themselves would use.

You can encourage employees to use thesis, subject, and sentence outlines, and even include them in information plans. Some word processing and automated publishing packages provide automatic outlining and sorting of information into different organizational patterns. In addition, other strategies can help you organize for specific writing situations.

Most strategies for organizing information focus on providing practical access to important concepts in a manner suitable to the needs of the audience and nature of the

information. For example, you might organize a memo about an off-site meeting spatially, or organize meeting minutes chronologically. When instructing employees, you can classify tasks or organize them by degree of difficulty. To send a long report online using your organization's E-mail system, you might break the report into chapters or files to make it easier to send. If you have a database and computer software that will allow it, you can also organize chunks of information online in hypertext nodes and webs that are randomly accessible through computers.

HOW TO RECOGNIZE WELL-ORGANIZED AND POORLY ORGANIZED WRITING

Well-organized writing allows you to follow the thoughts of a writer without hesitation as you read a document. Although you might not agree with what the writer says, your ability to understand a writer's thinking depends on how well the writing is organized at two important levels: the overall document level and the paragraph level. Long documents in particular require organization at the document level because readers need to know what the document is about and even whether they are the right audience for the document. A clear statement of purpose, a thesis, will generally provide readers with what they need to know to determine what the document is about, and a well-developed outline or table of contents in a longer report will allow them to see how the writer intends to develop ideas in the document.

One way to recognize weak writing is by its lack of thesis, outline, organized table of contents, or topic sentences at the beginning of paragraphs. Because longer reports benefit from these organizing structures more than shorter reports do, it is relatively easy to pick out poor organization in longer reports. Outlines or tables of contents for longer reports need to display organized thinking in the form of sections and subsections of the report. When an outline or a table of contents is disorganized, or when it lacks parallel constructions, it is difficult to understand how the writer views each of the items in it.

Consider a report that contains a collection of facts but indicates no opinion about those facts. The report may lack a central thesis, or it may have been written by someone who did not believe it was his or her job to take a stand. Writers who are tentative or who lack critical thinking skills may produce such documents. Such writers may include paragraphs, such as the one below, that offer little to guide the reader to an interpretation of the facts.

Report on Paper Consumption in Major Manufacturing Firms

Of the 72 firms surveyed, 48 acknowledged producing more than 300 pounds of paper per employee per year. The paper produced consisted of 73 percent "rag," or poorer-quality paper, such as computer paper, and 27 percent bonded, matte, or other forms of superior-quality paper. Of the 27 percent used by employees for office correspondence, more than half contained fewer than four lines per page. Employees in the 48 firms acknowledging large paper output admitted to discarding an additional 10 to 20 pages of blank color or cover sheet paper, which accompanies computer printouts.

Understanding that the example above is taken from a report whose purpose is to call for paper conservation in the workplace helps readers understand the context in which the facts should be interpreted. Had the writer included the following lead sentence, the paragraph would be easier for readers to understand: "A recent survey by Business Surveys Associates confirms the view that a large volume of paper is routinely wasted in the workplace."

HOW TO ORGANIZE EFFECTIVELY IN PREDICTABLE PATTERNS

To organize effectively for other people, writers must know the expectations of their audience, which means, as we have pointed out in previous units, knowing how to perform audience analysis at the planning stage of writing. Another factor that influences organization is the intrinsic logic of the material that you choose to write about, what Alred, Oliu, and Brusaw call "the internal logic of your subject" (1992, 106). Much of our resource material contains a sort of logic that simply relies on our skill as writers to bring it out. Most stories that we know from childhood, for example, have clearly discernible beginnings, middles, and ends, and organization by time, or chronological organization, seems a natural method of organizing stories or events. Writers of stories detect the innate chronological patterns within them, and translate those patterns into what we know as "Once upon a time . . ."

Several organizing principles are suggested by the innate logic in much organizational content. Such patterns include organizing by:

- alphabetical or numerical order
- cause and effect relationship
- comparability (contrast)
- complexity or difficulty

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- deduction (from general to specific)
- definition
- frequency
- induction (from specific to general)
- priority (order of significance or importance)
- problem-and-solution
- segmentation (logical division into parts)
- spatial relationship (where items occur or appear)
- time sequence

In general, writers choose from among the various patterns to derive a pattern or patterns that work best for what they are writing. Often, a writer can use more than one strategy within a single document—as managers do, for example, when they use comparison and contrast to compare an employee's performance to that of others, or when they use chronology in an employee performance evaluation to highlight the milestones of an evaluation period.

Choosing the Most Effective Pattern

Unfortunately, in workplace writing, patterns for organizing writing are not all equally effective. Some patterns, when used indiscriminately, can actually complicate writing or alienate audiences in ways that writers might not expect. A report to a manager written inductively, for example, can create a "cliff-hanger" effect, forcing managers who read it to wait until the end of the report to understand fully what its consequences are. Most managers do not have the time to devote to reading every page in lengthy reports, and they look automatically for a summary or statement of intention and results early in the report. Scientists and technical professionals, whose methodologies are essentially inductive, often have trouble adapting to a reporting style that diverges from inductive patterns, and as a result, their writing is sometimes not clear to managers or nontechnical professionals.

Knowing the characteristics of your audience is probably the best defense against choosing incorrect organizational patterns. Understanding what you can achieve with each pattern, and understanding how other writers use patterns effectively in similar writing situations for similar audiences can also help you to make the right choice.

Reusing Patterns Available in Templates

Because in recent years technology has allowed us to do so with great ease, many workplace writers are rapidly becoming borrowers of the writing of others. This phenomenon, often dubbed *information reuse*, *information borrowing*, and *information asset management*, really amounts to our being able to borrow both the content and format of other people's writing within minutes of when it first appears. Word processing programs, electronic publishing systems, imaging technology, database retrieval, and automated style and format technologies all make borrowing what is often called *boilerplate* a practical expedient for many writers in modern environments.

Janice Redish finds that younger writers, "have no background to counterbalance the influence of the organization's tradition and culture," and "look for the organization's earlier products as models" (in Bailey and Fosheim 1983, 155). In practice, whole sections of reports, particularly those that provide standard background information, are often adapted nearly verbatim and propagated from document to document. In addition, word processing and publishing tools now make it easy for writers to "copy" the formats or styles used by others. These reused formats are called *templates*.

For example, this guide was created using both boilerplate and a template. The section at the front of the guide, About the University of Maryland University College, is a boilerplate text that appears at the front of each of our student guides. The use of the boilerplate cuts down on time required for writing, typing, and proofreading, and it eliminates the opportunities for introducing errors and inaccuracies that come with each of these steps. The entire guide is formatted using a template to automatically set up any manuscript in conformance with our established style standards.

When writers reuse information from others, they should do so with full understanding of the organizational policies and implications as well as the legal ramifications, of doing so. Most organizations allow writers to reuse information internally so long as the information is not copyrighted or is copyrighted by the organization itself (not by individuals within it). In many large corporations, such as IBM, employees are encouraged to reuse information written by others in the corporation to save costs. Employee writers must strictly adhere to copyright law in seeking permission to use material and must correctly attribute all other uses of borrowed information.

Apart from the legal and ethical considerations that surround the reuse of information, managers should understand that the usefulness of such reproduction tools in actually helping writers to organize information coherently is limited. When writers adapt more than just the formatting from a template, for example, the results can be destructive. Poorly organized documents remain forever poorly organized, or worse, they become more poorly organized. As writers cut and snip bits and pieces of documents to paste them into other documents, overall patterns that once organized the original documents can be destroyed. To correct such technologically begotten errors, writers must also know how to reorganize documents once they have collected information into the template for a document. Acquiring information by tapping ready-made resources, alas, is only half the battle.

BASIC ORGANIZING STRATEGIES

Many writers who work from outlines find that writing them can be a chastening experience. Writers think this for two reasons: because outlines force you to reveal a larger scope or different evolution of ideas than you expected, or because they expose errors in your thinking that may force you to abandon your topic. Also, as mentioned earlier, most people believe that their thoughts are innately organized, and they do not think that they have the time to reorganize them. For this reason, many writers avoid even the most basic form of outlining, that of creating a thesis and listing follow-on ideas.

Thesis Outlines

Thesis outlines serve valuable purposes for writers who use them. A thesis outline can help even a busy writer to focus and direct writing so that it achieves coherence in a relatively short amount of time. To understand what a thesis outline is, let's look at the work of one employee who uses them as the basis for short reports. Notice that the rudimentary outline contained in the following status report appears in bulleted form rather than in traditional, nested outline style. Notice also that the writer adheres to parallel presentation strategies that succinctly state each milestone in language that can be echoed and expanded in longer reports.

Eiko Tanaka writes a weekly status report to her manager in which her purpose is to emphasize what she has achieved and to identify problems she is having. Eiko's report regularly contains a milestones section followed by a problems section. Because Eiko's manager has requested a fuller explanation of events than the bulleted items in milestones and problems can convey, Eiko also includes a written prose report of her status, resembling the following:

**Eiko Tanaka, Department 72, XYZ Corporation
Status, April 14–24, 1992**

Milestones:

- Completed annual budget review for department.
- Trained college coop to manage data output facility.
- Met with marketing concerning product information brochure.
- Conducted briefing for federal customer 122z.

Problems:

- Equipment failures reported for 2 database access machines. **Solution:** John Burns replacing existing equipment with new equipment and fixing old.
- No consensus between marketing and finance on projected expenditures for marketing brochure.
- Budget review complete but unable to check logic of 5-year outlay against forecast data in database. **Solution:** Will recheck data when system is available next week. In the interim, calculated based on last year's forecast, plus -2 deviation.

Discussion

This report provides details of milestones and problems associated with my work during the week of April 24, 1992.

My significant achievement for this week was completing the department budget review, followed by the training I provided Tim Moore, the new college coop. Although the budget review took more time than expected (200 person-hours), we were able to complete the report on time. The forecast data still needs checking, because we worked from last year's model after our databases became inaccessible. Tentatively, we plan to complete the checking by the end of next week. We submitted the report, Analysis of Proposed 1993 Budget Allocations, on Friday for your final approval.

Because Tim Moore assisted me in conducting the budget review, I was able to begin his training and my work on the budget simultaneously. Tim assisted in compiling the report and in analyzing the data. A full evaluation of Tim's training with recommendations for a permanent assignment for him is contained in his dossier at the secretary's desk.

The secretary also has copies of our briefing of Customer 122z for your inspection. Our achievement in this briefing was not noteworthy; however, it was necessary that we hold it so that there would be no surprises for 122z during the hearing. Harriet Jenkins and I produced foils for the briefing and outlined for 122z our company's stance on the upcoming congressional subcommittee hearing. There were few questions, but one representative of 122z requested copies of the foils, which will be made available to him through the usual channels.

Fortunately, by the time of the 122z briefing at the end of the week, we had ironed out most of the technical problems we experienced earlier in the week.

The main problem for us was, of course, the failure of equipment needed to access the forecast databases. John Burns is replacing the faulty equipment, and the databases should be active by the middle of next week.

This should also alleviate the impasse between the marketing and finance groups who cannot agree on projected costs for developing a marketing brochure.

As the example illustrates, Eiko's thesis outline consisted of a simple one-sentence explanation of her purpose in writing, followed by what were to become topic areas for each of the paragraphs in her report. This thesis-1-2-3 structure, a minimal outline, helped Eiko compose her document quickly and to know in advance what kinds of connections she would

have to make for her audience. A thesis outline focuses on a single main idea and related subsidiary ideas. Its brevity makes it a good organizing tool for short reports and memos, performance evaluations, job descriptions, and other forms of writing that are neither complex nor lengthy.

Full-Sentence and Subject Outlines

Full-sentence and subject heading outlines work well for longer reports or for writing that is complex. When topic areas can be divided into many subsidiaries, or, as in technical reports, when complex ideas need full elaboration, these types of outlines assist writers in mapping out the areas for discussion in advance. Full-sentence outlines offer the advantage of stating the writer's position completely, thus avoiding ambiguity. The following is an example of a full-sentence outline for a chapter in an explanatory report.

Chapter 1—The Pentagon has responsibility for strategic policies for deploying troops in time of conflict.

- I. Full responsibility for devising policies and exercising them rests with the Joint Chiefs of Staff.
 - A. The Joint Chiefs consist of representatives from all armed forces areas.
 - B. The Commander-in-Chief of the Armed Forces has sole responsibility for assembling the Joint Chiefs.
 - C. Attaches assist the Joint Chiefs in convening committee meetings and assembling data for policy making.
 - D. Strategic military commanders exercise and enact the policies of the Joint Chiefs, providing advice and sounding-board capabilities prior to enacting most policies.
- II. Pentagon support staffs provide additional research and policy-making assistance, and they oversee the administrative budget.
 - A. Finance and Revenue staff coordinate monetary resource and vending activities.
 - B. The Pentagon personnel office oversees administrative staffing, military staff, exempt civilian and nonexempt civilian staff.
 - C. Physicians working with Walter Reed Army Hospital provide medical assistance and act as advisers in matters of biological warfare and casualty analysis.

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- III. The Executive Branch liaison ensures full communication between the Pentagon areas and White House personnel.
 - A. Information from the Executive Branch liaison is the responsibility of the Communications office of the Pentagon.
 - B. The liaison officer reports directly to the Commander-in-Chief.
 - C. Pentagon-related communication from the White House is achieved through the designated White House spokesperson, and is safeguarded by the Central Intelligence Agency.

Unlike the full-sentence outline, a subject heading outline simply lists key words that identify the topic of each main section. Subject heading outlines can be words such as nouns, or they can be phrases or groups of words that identify the topic of the section.

ORGANIZING ONLINE INFORMATION

Online information is information written for, stored in, and accessed by computer. It can include many kinds of writing—ordinary notes sent through E-mail systems, online books, online notebooks, online reports stored in databases, online artwork, hypertext information, and information written specifically for computer software, such as Help screens and system messages. The majority of today's technical writers must design and write some form of online information. Many managers and employees who are not technical writers also find themselves writing for online presentation.

How Online Information Differs from Hardcopy Information

Online information differs from hardcopy information primarily in the way it looks and how it can be accessed and used. When it is presented in conjunction with special software, the way you use it can also vary. Because the average computer screen is 24 lines long and 80 characters wide, information presented online must either be specially formatted to display, or computer software must compensate for what cannot be displayed on the screen. Technical writers writing online information frequently use special authoring programs to format and display information online.

Another difference between online information and hardcopy is in the way you access and use it. To search for something in a hardcopy book, for example, you simply go to the book, open it, thumb through it or turn to the table of contents or index to find what you want.

To find online information, however, you will probably need to access a computer by turning it on (referred to as booting it) and then by issuing a series of commands, or by pressing a key or pointing to a symbol on a menu. The information you need may be stored miles away from where you are physically located, and you may access it remotely using special equipment. Once you find the online book or report you want, in most cases, you will go right to what you want rather than reading through large amounts of information online. Online readers search for information by allowing the computer software to locate the information. If you are accessing a hypertext system, the information you seek may already be chunked or divided before you access it. It may even be specially designed for the type of user that the computer believes you to be. When you access hypertext information as a novice user, you may see an introductory explanation of a topic, and later, when you become more expert, you may read more advanced information on the same topic.

Adjusting for Hypertext and Online Display

With all of these capabilities in today's computer technology, writers of online information must rethink how they organize and present information when they know that they are writing for online presentation. One major consideration for writers when they organize such information is the expectation that audiences who read and search information online will do so randomly, often with nothing but what they searched for visible on the screen. Because online readers may not always see the structure that a writer might impose on hardcopy through outlining, when you write online, you will probably want to keep most online information short and self-sufficient. Readers may be able to scroll through your document so that the information displays if it is hidden. Because few users will scroll dutifully through an online document for any period of time, however, you should also consider organizing your writing deductively, or with the most important idea or thesis first. In addition, if your document contains artwork to convey meaning, you may need to work carefully to get the art online in a format that will display. If your audience cannot display the art because of computer terminal limitations, you may need to exclude the art from your document.

Many computer programs help their users by adopting metaphors from everyday life. If you use electronic mail, for example, you may write notes to other users in a form that looks like a hardcopy note, and you may store your notes in notebooks. It is easier to write online information when you can be sure that a familiar metaphor will be used. Some of the same organizing strategies that you used for hardcopy may continue to work for your online writing.

If your writing is for use with a hypertext system, you will need to rethink how you present information.

Hypertext is a form of online information that allows readers to jump from place to place, usually within large databases of specially organized information. Readers can create webs and nodes of information; for example, they can ask for information about a concept such as "political activism," and then associate other, related information with it. With such a system, little of a writer's original design for a document is retained, and few of the transitional devices will have meaning for readers. Writers of hypertext, in addition, must sometimes write without knowing who their audience is or how their information will be used. Although many hypertext systems allow writers to create different kinds of writing for different audiences, they may also allow users of the system to link to any available information, or to redefine paths to information that authors have defined. Writers writing under such conditions inevitably create documents for what they consider median audiences. They make word choices, and create tone, style, and levels of technicality that can be understood by average audiences most of the time.

SELLING ORGANIZATIONAL STRATEGIES TO EMPLOYEES

Except in the area of online information, most employees will probably already have had some experience organizing information before they began their current jobs. Managers who want to improve organization in employee writing should realize this and develop a program under which employees can build on the organizational skills they already have. In many work environments, this means providing opportunities for employees to practice the skills they have and add additional skills to their repertoire. Managers can encourage practices that build organizational skills in ways such as the following:

- Refuse to accept writing that is obviously disorganized or hastily put together.
- Require sentence or thesis outlines for reports longer than two pages.
- Authorize compensation time for employees who work at home or on weekends to reorganize and revise documents.
- Reward employees whose writing shows exceptional organization by instituting informal awards, such as a "golden pen" award suggested by one group of managers who rewarded employee writing by giving employees Cross pens.
- Provide education in writing either formally or informally, through writing classes or through brown-bag seminars where participants analyze peer documents or review samples of well-organized writing.

REFERENCES

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REVIEW QUESTIONS

1. Why is it important for managers to understand a variety of organizing strategies for writing?
2. How can a thesis paragraph effectively provide organization for a piece of writing?
3. What are the characteristics of good outlines, and what distinguishes them from bad outlines?
4. When would you write or advise others to write a subject outline? A sentence outline?
5. What assistance is currently available for writers through technology for organizing information?
6. What kinds of writing tasks might call for these organizing strategies:
 - chronological organization
 - spatial organization
 - classification
 - definition
7. What are some of the major differences between organizing information for print and organizing for online display?
8. Define *hypertext* and briefly discuss the challenges it poses for writers.
9. What are the advantages of inductive and of deductive organizing?
10. Briefly describe two symptoms of poorly organized writing.
11. What are two strategies that managers can use to teach employees the value of good organization?

INTEGRATING QUESTIONS

1. Managers often find that establishing a priority of topics in a business document solidifies the order in which employees will act upon requests made in the document. What writing options are available for managers when they wish for multiple requests to be acted upon simultaneously?
2. What are the advantages and disadvantages associated with requiring employees to provide outlines for important written documents?
3. What is the relationship between information planning and choosing organizing strategies for individual documents?

SUGGESTED ACTIVITIES

- Rewrite an employee's status report to you using three different organizational strategies. List the ways in which priorities and emphasis change when the organization of the report changes.
- Construct a detailed outline for a meeting that you will host using a nontraditional format. List other methods that you devise for conveying priorities and relationships among the topics on the agenda for the meeting.
- Reread the Declaration of Independence to determine whether its organization is inductive or deductive.

SUGGESTED READING

Alred, Gerald J., Walter E. Oliu, and Charles T. Brusaw. "Organizing Information for a Document." In *The Professional Writer: A Guide for Advanced Technical Writing*. New York: St. Martin's Press, 1992.

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