Understanding Audience and Purpose

Projects of all sizes and types succeed only if they are based on an accurate understanding of the needs and desires of their audiences and have a clear, focused purpose. Because the documents and other communication you produce in the workplace will, more often than not, form the foundations of these projects, they too will succeed only if they are based on an accurate understanding of your audience and have a clear purpose.

Although you might not realize it, you probably consider audience in your day-to-day communication. For example, when you tell your parents about a new job you’ve landed, you keep the discussion general and focus on the job details you know they care most about: its location, its salary and benefits, and your start date. But when you email a former internship supervisor with the same news, you discuss your upcoming duties and projects in more detail.

As you produce documents for this technical-communication course, you will of course consider your instructor’s expectations, just as you do when you write anything for any other course. But keep in mind that your instructor in this course is also playing the role of the audience that you would be addressing if you had produced the document outside of this college course. Therefore, to a large extent your instructor will likely evaluate each of your course assignments on how effectively you’ve addressed the audience and achieved the purpose specified in the assignment.

Analyzing an audience means thinking about who your audience is, what they already know about your subject, how they feel about it, and how they are going to use the information you present. You analyze your audience as you plan your document so that it appeals to their interests and needs, is easy for them to understand, and motivates them to pay attention to your message and consider your recommendations.

The word *purpose* refers to what you want to accomplish with the document you are producing. Most often, your purpose is to explain to your audience how something occurs (how regenerative braking systems work in hybrid cars), how to carry out a task (how to set up a Skype connection), or why some situation is either good or bad (why the new county guidelines for water use will help or hurt your company). When your purpose is to explain why a situation is either good or bad, you are trying to reinforce or change the audience’s attitudes toward the situation and perhaps urge them to take action. As you will see, in many cases your technical communication will have multiple purposes.

Before you can start to think about writing about your subject, analyze your audience and purpose. Doing so will help you meet your readers’ needs — and your own. For instance, you’re an engineer working for a consulting company. One document to which you might contribute is a report to the city planning board about how building a housing development would affect the natural environment as well as the city’s roads, schools, and sanitation infrastructure. That’s the subject of the report. The purpose is to motivate the planning board to approve the project so that it can begin. How does the audience affect how you analyze your purpose? Think about who the board members are. If most of them are not engineers, you don’t want to use specialized vocabulary and advanced engineering graphics and concepts. You don’t want to dwell on the technical details. Rather, you want to use general vocabulary, graphics, and concepts. You want to focus on the issues the board members are concerned about. Would the development affect the environment negatively? If so, is the developer including a plan to offset that negative effect? Can the roads handle the extra traffic? Can the schools handle the extra kids? Will the city have to expand its police force? Its fire department? Its sewer system?

In other words, when you write to the planning board, you focus on topics they are most interested in, and you write the document so that it is easy for them to read and understand. If the project is approved and you need to communicate with other audiences, such as architects and contractors, you will have different purposes, and you will adjust your writing to meet each audience’s needs.

What can go wrong when you don’t analyze your audience? McDonald’s Corporation found out when it printed takeout bags decorated with flags from around the world. Among them was the flag of Saudi Arabia, which contains scripture from the Koran. This was extremely offensive to Muslims, who consider it sacrilegious to throw out items bearing sacred scripture. As a result, McDonald’s lost public credibility. Throughout this chapter, the text will refer to your *reader* and your *document*. But all of the information refers as well to oral presentations, which are the subject of Chapter 21, as well as to nonprint documents, such as podcasts or videos.
Using an Audience Profile Sheet

As you read the discussions in this chapter about audience characteristics and techniques for learning about your audience, you might think about using an audience profile sheet: a form that prompts you to consider various audience characteristics as you plan your document. For example, the profile sheet can help you realize that you do not know much about your primary reader’s work history and what that history can tell you about how to shape your document. Figure 5.2 shows an audience profile sheet that provides important information about one of a writer’s most important readers.

![AUDIENCE PROFILE SHEET](image)

**AUDIENCE PROFILE SHEET**

**Reader’s Name:** Harry Becker  
**Reader’s Job Title:** Manager, Drafting and Design Department  
**Kind of Reader:** Primary X Secondary  
**Education:** BS, Architectural Engineering, Northwestern, 1992. CAD/CAM Short Course, 1992; Motivating Your Employees Seminar, 1997; Writing on the Job Short Course, 2002  
**Professional Experience:** Worked for two years in a small architecture firm. Started here 16 years ago as a drafts-person. Worked his way up to Assistant Manager, then Manager. Instrumental in the Wilson project, particularly in coordinating personnel and equipment.  
**Job Responsibilities:** Supervises a staff of 12 draftspeople. Approves or denies all requests for capital expenditures over $2,000 coming from his department. Works with employees to help them make the best case for the purchase. After approving or denying the request, forwards it to Tina Buterbaugh, Manager, Finance Dept., who maintains all capital expenditure records.  
**Personal Characteristics:** N/A  
**Personal Preferences:** Likes straightforward documents, lots of evidence, clear structure. Dislikes complicated documents full of jargon.  
**Cultural Characteristics:** Nothing of note.  
**Attitude Toward the Writer:** No problems.  
**Attitude Toward the Subject:** He understands and approves of my argument.  
**Expectations About the Subject:** Expects to see a clear argument with financial data and detailed comparisons of available systems.  
**Expectations About the Document:** Expects to see a report, with an executive summary, of about 10 pages.  
**Reasons for Reading the Document:** To offer suggestions and eventually approve or deny the request.  
**Way of Reading the Document:**  
- Skim it _X_ Study it _X_ Read a portion of it _X_ Which portion?  
- Modify it and submit it to another reader ___  
- Attempt to implement recommendations ___  
- Use it to perform a task or carry out a procedure ___  
- Use it to create another document ___  
- Other ___ Explain.  
**Reading Skill:** Excellent  
**Reader’s Physical Environment:** N/A

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**Figure 5.2**  
Markel/Selber, *Technical Communication*, 12e, © 2018 Bedford/St. Martin’s

**FIGURE 5.2 Audience Profile Sheet**  
Assume that you work in the drafting department of an architectural engineering firm. You know that the company’s computer-assisted design (CAD) software is out of date and that recent CAD technology would make it easier and faster for the draftspersons to do their work. You want to persuade your company to authorize buying a CAD workstation that costs about $4,000. Before getting started with your document, you fill out an audience profile sheet for your primary reader, Harry Becker, the manager of your company’s Drafting and Design Department.
You should modify this form to meet your own needs and those of your organization. For a printable version of Fig. 5.2, see the downloadable forms in LaunchPad.

If your document has several readers, you must decide whether to fill out only one sheet (for your most important reader) or several sheets. One technique is to fill out sheets for one or two of your most important readers and one for each major category of other readers. For instance, you could fill out one sheet for your primary reader, Harry Becker; one for managers in other areas of your company; and one for readers from outside your company.

When do you fill out an audience profile sheet? Although some writers like to do so at the start of the process as a way to prompt themselves to consider audience characteristics, others prefer to do so at the end of the process as a way to help themselves summarize what they have learned about their audience. Of course, you can start to fill out the sheet before you begin and then complete it or revise it at the end.
Determining the Important Characteristics of Your Audience

When you analyze the members of your audience, you are trying to learn what you can about their technical background and knowledge, their reasons for reading or listening to you, their attitudes and expectations, and how they will use the information you provide.

WHO ARE YOUR READERS?

For each of your most important readers, consider seven factors:

- **The reader’s education.** Consider the person’s degree as well as any formal education or training the person completed while on the job. Also keep in mind when the education and training occurred, since methods and practices can change over time.
  
  Knowing your reader’s educational background helps you determine how much supporting material to provide, what level of vocabulary to use, what kind of sentence structure to use, what types of graphics to include, how long your document should be, and whether to provide such elements as a glossary or an executive summary.

- **The reader’s professional experience.** A nurse with a decade of experience might have represented her hospital on a community committee to encourage citizens to give blood and might have contributed to the planning for the hospital’s new delivery room. These experiences would have provided several areas of competence or expertise that you should consider as you plan your document.

- **The reader’s job responsibility.** Consider the major job responsibility of your reader and how your document will help that person accomplish it. For example, if you are writing a feasibility study on ways to cool the air for a new office building and you know that your reader, an upper-level manager, oversees operating expenses, you should explain how you are estimating future utility costs.

- **The reader’s reading skill.** Consider whether you should be writing at all or whether it would be better to use another medium, such as a video, an oral presentation, or a podcast. If you decide to write, consider whether your reader will be able to understand how to use the type of document you have selected, handle the level of detail you will present, and easily comprehend your graphics, sentence structure, and vocabulary.

- **The reader’s cultural characteristics.** Understanding cultural characteristics can help you appeal to your reader’s interests and avoid confusing or offending him or her. As discussed later in this chapter (pp. 96–103), cultural characteristics can affect virtually every aspect of a reader’s comprehension of a document and perception of the writer.

- **The reader’s personal characteristics.** Does your reader have any other personal characteristics that you should consider as you write and design your document? One important consideration is accessibility. For example, in your videos you may need to provide closed captioning to accommodate the hearing impaired, or in a diagram you may want to use not just various colors but also various shapes to accommodate those with deficient color vision.

- **The reader’s personal preferences.** One person might hate to see the first-person pronoun *I* in technical documents. Another might find the word *interface* distracting when the writer isn’t discussing computers. Does your reader prefer one type of application (such as blogs or memos) over another? Try to accommodate as many of your reader’s preferences as you can.

WHY IS YOUR AUDIENCE READING YOUR DOCUMENT?

For each of your most important readers, consider why he or she will read your document. Some writers find it helpful to classify readers into categories — such as primary, secondary, and tertiary — that identify each reader’s distance from the writer. Here are some common descriptions of these three categories of readers:

- **A primary audience** consists of people to whom the communication is directed; they may be inside or outside the writer’s own organization. For example, they might include the writer’s team members, who assisted in carrying out an analysis of a new server configuration for the IT department; the writer’s supervisor, who reads the analysis to decide whether to authorize its main recommendation to adopt the new configuration; and an executive, who reads it to determine how high a priority the server project should have on a list of projects to fund. If you were producing text or videos for the Hewlett-Packard website, your primary audience would include customers, vendors, and suppliers who visit the site.

- **A secondary audience** consists of people more distant from the writer who need to stay aware of
developments in the organization but who will not directly act on or respond to the document. Examples include managers of other departments, who are not directly involved in the project but who need to be aware of its broad outlines, and representatives from the marketing and legal departments, who need to check that the document conforms to the company’s standards and practices and with relevant legal standards, such as antidiscrimination or intellectual-property laws. External readers who are part of a secondary audience might include readers of your white paper who are not interested in buying your product but who need to stay current with the new products in the field.

- **A tertiary audience** consists of people even further removed from the writer who might take an interest in the subject of the report. Examples include interest groups (such as environmental groups or other advocacy organizations); local, state, and federal government officials; and, if the report is made public, the general public. Even if the report is not intended to be distributed outside the organization, given today’s climate of information access and the ease with which documents can be distributed, chances are good that it will be made available to outsiders.

Regardless of whether you classify your readers using a scheme such as this, think hard about why the most important audience members will read your document. Don’t be content to list only one purpose. Your direct supervisor, for example, might have several purposes that you want to keep in mind:

- to learn what you have accomplished in the project
- to determine whether to approve any recommendations you present
- to determine whether to assign you to a follow-up team that will work on the next stage of the project
- to determine how to evaluate your job performance next month

You will use all of this information about your audience as you determine the ways it affects how you will write your document or plan your presentation. In the meantime, write the information down so that you can refer to it later.

**WHAT ARE YOUR READERS' ATTITUDES AND EXPECTATIONS?**

In thinking about the attitudes and expectations of each of your most important readers, consider these three factors:

- **Your reader’s attitude toward you.** Most people will like you because you are hardworking, intelligent, and cooperative. Some won’t. If a reader’s animosity toward you is irrational or unrelated to the current project, try to earn that person’s respect and trust by meeting him or her on some neutral ground, perhaps by discussing other, less volatile projects or some shared interest, such as gardening, skiing, or science-fiction novels.

- **Your reader’s attitude toward the subject.** If possible, discuss the subject thoroughly with your primary readers to determine whether they are positive, neutral, or negative toward it. Table 5.1 provides some basic strategies for responding to different attitudes.

- **Your reader’s expectations about the document.** Think about how your readers expect to see the information treated in terms of scope, organizational pattern, and amount of detail. Consider, too, the application. If your reader expects to see the information presented as a memo, use a memo unless some other format would clearly work better.

**TABLE 5.1 Responding to Different Attitudes**

<table>
<thead>
<tr>
<th>IF ...</th>
<th>TRY THIS ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your reader is neutral or positively inclined toward your subject</td>
<td>Write the document so that it responds to the reader’s needs; make sure that vocabulary, level of detail, organization, and style are appropriate.</td>
</tr>
<tr>
<td>Your reader is hostile to the subject or to your approach to it</td>
<td>• Find out what the objections are, and then answer them directly. Explain why the objections are not valid or are less important than the benefits. For example, you want to hire an online-community manager to coordinate your company’s social-media efforts, but you know that one of your primary readers won’t like this idea. Try to find out why. Does this person think social media are a fad? That they are irrelevant and can’t help your company? If you understand the objections, you can explain your position more effectively. • Organize the document so that your recommendation follows your explanation of the benefits. This strategy encourages the hostile reader to understand your argument rather than to reject it out of hand.</td>
</tr>
</tbody>
</table>
• Avoid describing the subject as a dispute. Seek areas of agreement and concede points. Avoid trying to persuade readers overtly; people don’t like to be persuaded, because it threatens their egos. Instead, suggest that there are new facts that need to be considered. People are more likely to change their minds when they realize this.

Your reader was instrumental in creating the policy or procedure that you are arguing is ineffective

In discussing the present system’s shortcomings, be especially careful if you risk offending one of your readers. When you address such an audience, don’t write, “The present system for logging customer orders is completely ineffective.” Instead, write, “While the present system has worked well for many years, new developments in electronic processing of orders might enable us to improve logging speed and reduce errors substantially.”

For tips on critiquing a team member’s draft diplomatically, see Ch. 4, p. 71.

HOW WILL YOUR READERS USE YOUR DOCUMENT?

In thinking about how your reader will use your document, consider the following three factors:

• The way your reader will read your document. Will he or she
  — file it?
  — skim it?
  — read only a portion of it?
  — study it carefully?
  — modify it and submit it to another reader?
  — try to implement its recommendations?
  — use it to perform a test or carry out a procedure?
  — use it as a source document for another document?

If only 1 of your 15 readers will study the document for details such as specifications, you don’t want the other 14 people to have to wade through them. Therefore, put this information in an appendix. If you know that your reader wants to use your status report as raw material for a report to a higher-level reader, try to write it so that it can be reused with little rewriting. Make sure the reader has access to the electronic file so that passages can be merged into the new document without needing to be retyped.

• The physical environment in which your reader will read your document. Often, technical documents are formatted in a special way or constructed of special materials to improve their effectiveness. Documents used in poorly lit places might be printed in larger-than-normal type. If documents are to be used on ships, on aircraft, or in garages, where they might be exposed to wind, water, and grease, you might have to use special waterproof bindings, oil-resistant or laminated paper, color coding, and unusual-sized paper.

• The digital environment in which your reader will read your document. If you are writing a document that will be viewed online, consider the platforms on which it will be accessed. Will readers be viewing it on mobile devices? Desktop computers? Both? How can you design the document so that it is easy to access — easy to get to, to see, to navigate, and to use — in these environments?

For more about designing a document for use in different environments, see Ch. 11, p. 249.