PROFESSIONAL WRITING · STUDY GUIDE

Exam 1 Study Guide

This guide covers the first two chapters. You will learn why work writing puts the conclusion first, how one message reaches four kinds of reader, and how to state a purpose an outsider could check. Then you will put that thinking under pressure in email: choosing the channel, writing the subject line and the ask, setting the tone, and handling recipients and risk. Work one chapter at a time. Read the "what to know" paragraphs, copy the tables out by hand, then try each worked case with the steps covered. Finish each chapter with its ten self-test items. The cram sheet at the end puts every pattern in one place.

WHAT THIS GUIDE COVERS

- Chapter 1 · school versus work writing, scanning and BLUF, the action request, four kinds of reader, expertise and stakes, the purpose statement, four jobs, the rhetorical situation, channel and constraints, documents of record, PACT and the pre-send rubric.
- Chapter 2 · the channel-fit test and the three-reply rule, subject lines, salutations and signature blocks, BLUF and the full ask, formatting for scanning, register and hedging, bad news, refusals and apologies, To, CC, BCC, forwarding and confidentiality.

CHAPTER 1

Writing at Work: Audience, Purpose and Context

Read it in full: **Chapter 1 in the textbook**. Practice it in the lab: **Purpose Forge** and **The Pre-Send Rubric**.

What to know

Workplace writing is not schoolwork with a job attached. It is the job. It moves money, schedules, patients, permissions and blame. When it fails, it usually fails for boring, fixable reasons: the reader could not tell what was asked, why it concerned them, or what to do by when.

School and work reward different things. An essay rewards visible thinking, because an instructor reads to the end and is paid to do so. A workplace document rewards a decision made sooner, a task done right the first time, and a risk recorded before it becomes an event. **Reader-centered writing** organizes the page around what the reader has to do, not the order in which you figured things out. It is not a softer standard. Compressing a two-week audit into five sentences a director can act on is harder than writing fifteen pages.

Readers scan rather than read. Eye-tracking work shows F-shaped and layer-cake patterns. Scholars argue about how far lab findings fit a short email on a phone, but the direction is not seriously disputed: the first line and the left edge get the most attention, and attention decays fast. So the load-bearing sentence goes where the eye already is. That is the idea behind **bottom line up front** (BLUF), a habit borrowed from U.S. military staff writing. The first two sentences answer what this is about, what you want, and by when. The **action request** pattern is: I need [who] to [do what] by [when] so that [consequence].

One message reaches several readers. The **primary reader** must act. **Secondary readers** are copied to stay informed or object. A **gatekeeper** controls whether the primary reader ever sees it. A **tertiary reader** is the stranger in the future: an auditor, surveyor, attorney or successor. Write the body for the least technical reader who must act and push depth into an attachment. Audience adaptation changes emphasis, vocabulary and depth. It never changes the facts. Omitting what a reader cannot use is fine; shading what is inconvenient is not.

Purpose is a verb, not a topic. The frame is: After reading this, [reader] will [specific action] by [date], because [reason that matters to them]. The test is whether an outsider could tell you succeeded. Documents do one of four jobs: inform, request, persuade or record, with a quieter fifth job of keeping the relationship. Pick one as primary. Keep one ask per document.

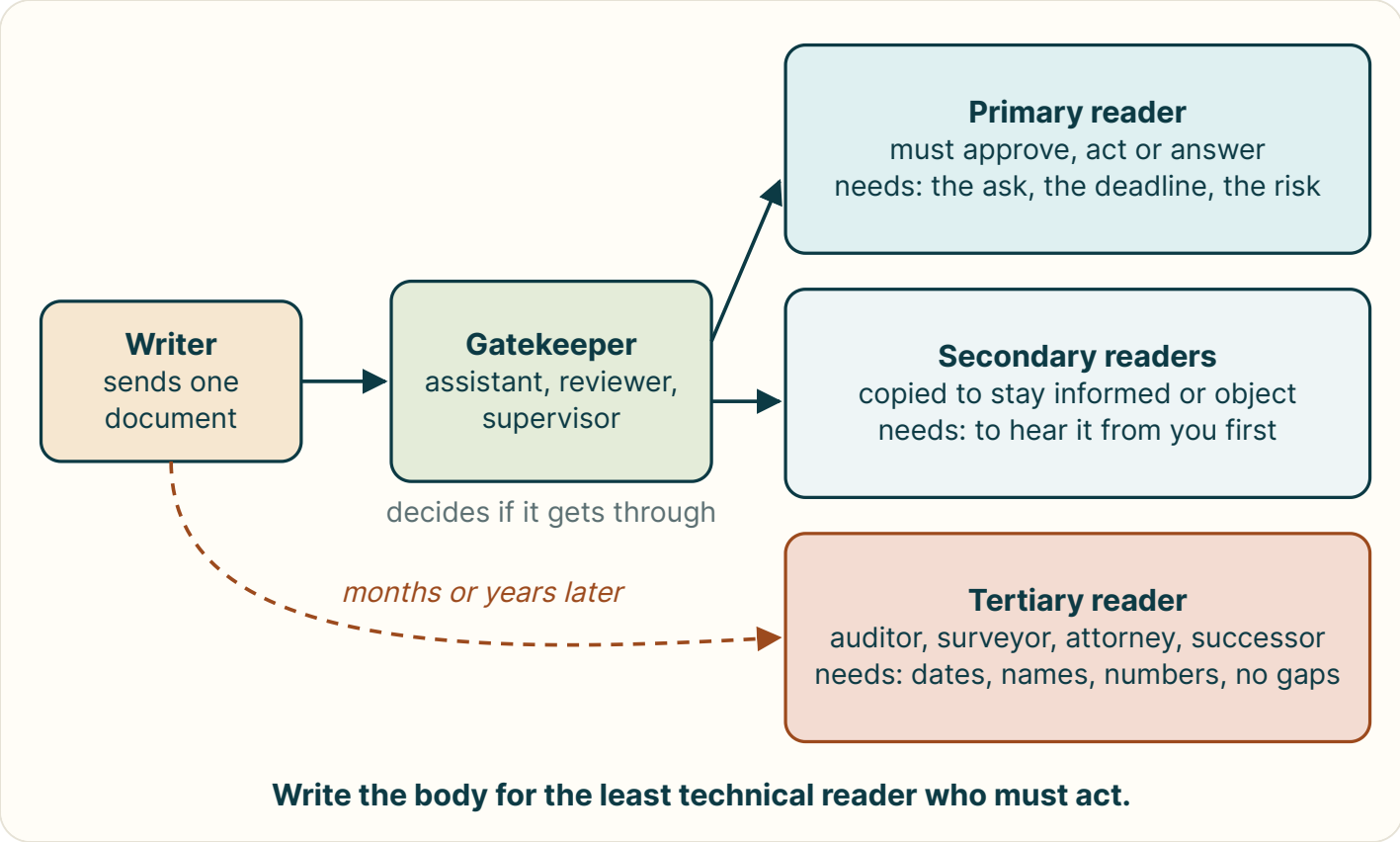
Context covers channel, constraint and the record. Lloyd Bitzer (1968) described the **rhetorical situation** as an exigence, an audience able to act, and constraints. Richard Vatz (1973) argued that writers construct situations by choosing what matters. The debate is open, and both sides agree outside forces shape the writing. Choose the channel on four variables: complexity, speed, emotional load and the need for a record. Bad news and negotiation go to voice; the record goes to

writing. Constraints include time, policy, privacy (HIPAA, FERPA), hierarchy and accessibility. Assume everything is a **document of record** and may be discoverable.

Before drafting, run **PACT**: Person, Aim, Constraints and channel, Test. Before sending, run the eight-item pre-send rubric, or the faster ten-second test: a colleague glances for ten seconds and must be able to say what you want and by when.

LOCK THESE IN

- Work writing is judged by what the reader can do after four seconds, so the conclusion goes first.
- BLUF: the first two sentences say what this is about, what you want, and by when.
- Action request: I need [who] to [do what] by [when] so that [consequence]. Missing deadline makes a suggestion; missing consequence makes it optional; missing name makes it nobody's job.
- Four readers: primary acts, secondary is copied, gatekeeper controls access, tertiary reads it cold years later.
- Purpose statement: reader, specific action, date and a reason that matters to them. If you cannot fill every slot, you are not ready to write.
- Four jobs: inform, request, persuade, record. One primary job and one ask per document.
- Channel by complexity, speed, emotional load and need for a record. Chat is written like conversation but retained like email.
- PACT before drafting; the eight-item rubric or the ten-second test before sending.



Four readers hide in one distribution list. The gatekeeper decides whether the primary reader sees it, secondary readers are copied, and a tertiary reader may open it years later with none of your context.

Key terms and comparisons

Term	What it means	Use it for
Primary reader	The person who must approve, act or answer	Structure the message for this reader
Gatekeeper	Assistant, reviewer, supervisor, legal or compliance	Give a forwardable summary with no policy problems
Secondary reader	Copied or affected colleague	Tell them first, so they do not hear it as a rumor
Tertiary reader	Future auditor, surveyor, attorney, successor	Dates, names, numbers, no unexplained gaps
Translation gap	Accurate content pitched above what the reader can act on	A warning sign when an expert writes for a manager
Stakes	What a reader stands to gain, lose or answer for	Name the stake in your opening
Register	The formality a relationship and setting expect	Calibration, not politeness
Constraint	Time, policy, privacy, hierarchy, accessibility	Shapes what may be said, how and when
Document of record	Writing retained as evidence of what was known or done	Write for a reasonable stranger
Discoverability	Retained messages can be compelled in litigation or audit	No off-the-record work message

School writing versus work writing

Dimension	College essay	Workplace document
Reader's goal	Assess whether you understand	Decide, act or file, then move on
Who reads it	One person, once, in order	Several people, unevenly, some months later
What earns credit	Depth, nuance, evidence of process	Speed to the point, accuracy, a clear next step
Structure	Build up to the conclusion	Lead with the conclusion, support it after
Failure	A lower grade	Silence, a wrong action, a delay, a citation
Afterlife	Returned and forgotten	Forwarded, quoted, archived, subpoenaed

PACT and the pre-send rubric

Item	The question or check
P: Person	Who must act, who is watching, who inherits this later?
A: Aim	One sentence: reader, verb, date
C: Constraints and channel	What limits apply, and what pipe fits?
T: Test	What observable thing tells me this worked?
Rubric 1 to 4	Purpose visible; it is up front; right primary reader; deadline present
Rubric 5 to 8	Reader's stake named; objection pre-answered; channel and record fit; survives forwarding

Worked cases

WORKED CASE 1 · TURNING A BURIED REQUEST INTO BLUF

Kai, a unit clerk, drafts: "Hi Dana, I hope you are well. As you may remember, a few of us have been looking at how long intake takes. I timed some admissions and there seem to be a few things going on. Let

me know your thoughts." Rebuild the opening.

STEP 1 · FIND THE PURPOSE

Kai wants Dana to approve a 30-day pilot of a shorter intake form. That is a request, not an update.

STEP 2 · FILL THE ACTION REQUEST

I need Dana to approve the pilot by Friday so that we can start Monday and stop re-keying data the ED already collected.

STEP 3 · PUT IT FIRST

"Hi Dana: I need your approval by Friday to pilot a shortened intake form for 30 days." Then one line of evidence (the timing data), then the risk (low and reversible, old form kept as a fallback).

STEP 4 · CHECK THE CLOSE

Replace "Let me know your thoughts" with a real option: if Friday is tight, Kai can hold the Tuesday meeting slot instead. No still produces a decision.

WORKED CASE 2 · CASTING THE READERS

A memo asks the finance director to fund a training day. It goes through her assistant, is copied to two charge nurses, and will sit in a file the accreditation surveyor may open next year. Name each reader and what each needs.

STEP 1 · WHO MUST ACT

The finance director is the primary reader. She needs the ask, the deadline and the cost risk, in that order.

STEP 2 · WHO CONTROLS ACCESS

The assistant is the gatekeeper. She needs a summary she can forward without rewriting.

STEP 3 · WHO IS WATCHING

The two charge nurses are secondary readers. They need to learn about it from the writer, not from a rumor.

STEP 4 · WHO READS IT LATER

The surveyor is the tertiary reader. She needs dates, names and numbers so the reasoning holds up cold.

THE LESSON

Layer it: ask first, evidence second, detail in the attachment. One document can serve all four.

WORKED CASE 3 · REWRITING A VAGUE PURPOSE

Write an operational purpose statement for "Update the team on the project."

STEP 1 · NAME THE READER

The four team leads.

STEP 2 · NAME THE CHANGE

They will know the go-live moved to 15 August.

STEP 3 · NAME THE RETURN ACTION AND DATE

They will send revised training dates by 1 July.

STEP 4 · TEST IT

"After reading this, the four team leads will know the go-live moved to 15 August and will send me their revised training dates by 1 July." An outsider can check whether the dates arrived, so the statement passes.

WORKED CASE 4 · ONE FACT FOR THREE READERS

Two monitors on a unit failed calibration. Write the core of the message for a patient's daughter and for a compliance officer.

STEP 1 · FIX THE FACTS

Two of four monitors failed calibration; both were removed and replaced with loaners; the patient's monitor was not one of them.

STEP 2 · THE DAUGHTER

Plain words, no policy numbers: we check every monitor on a schedule, two did not pass, we swapped them out, and her mother's monitor was checked again at 9 a.m.

STEP 3 · THE COMPLIANCE OFFICER

Dates, unit numbers, the policy, the times they were tagged out, that no patient events were associated, and the logs attached.

CHECK IT A SECOND WAY

Read the two side by side. Nothing in one contradicts the other. The daughter's version omits what she cannot use. That is adaptation, not shading.

TRAPS PEOPLE FALL INTO

- **Writing for a reader who is paid to finish.** At work nobody owes you a second paragraph. Lead with the point.
- **Calling front-loading rude.** It is a courtesy. The wrong reader can stop in four seconds instead of forty.
- **Writing only for the To line.** The gatekeeper and the tertiary reader read differently and can stall or judge the message.
- **Stating a topic as a purpose.** "The new scheduling software" is a topic. A purpose names a reader, a verb and a date.
- **Stacking two purposes.** An update that is secretly a complaint does neither job. Readers answer the hidden purpose.

- **Treating chat as off the record.** Chat is retained like email and can be discoverable.
- **Putting speculation in a record.** "Night staff were slammed again" is opinion. Records hold observed fact.
- **Editing a filed record quietly.** Corrections go in a dated, attributed addendum. A silent change looks like concealment.

Chapter 1 self-test · ten items

1. According to the chapter, what does a workplace document reward most?

A. Visible thinking that shows how you got there
B. A decision made sooner and a clear next step
C. A length that proves the work was thorough
D. A structure that builds up to the conclusion

B. A decision made sooner and a clear next step Work readers want to decide, act or file. Visible process and a built-up conclusion are what the school essay rewards.

2. Which slot, if missing from an action request, turns it into a mere suggestion?

A. The greeting
B. The attachment
C. The deadline
D. The signature

C. The deadline The chapter says a request missing the deadline becomes a suggestion, one missing the consequence becomes optional, and one missing the name becomes nobody's problem.

3. A compliance reviewer screens a message before the director sees it. What kind of reader is the reviewer?

A. A primary reader
B. A tertiary reader
C. A secondary one
D. A gatekeeper

D. A gatekeeper A gatekeeper controls whether the primary reader ever receives or approves the message.

4. For a mixed audience, whom should the body of the document be written for?

A. The least technical person among those who act
B. Whoever is most senior on the distribution list
C. The expert who will check every single detail
D. The reader most likely to object to the request

A. The least technical person among those who act Experts skip to the appendix and are not offended by a clear summary. Non-experts facing the appendix simply stop.

5. Which is the strongest purpose statement?

A. Raise awareness of hand hygiene across the whole hospital unit this month
B. Share some thoughts about hand hygiene with the nursing team
C. Day-shift nurses complete the hand hygiene attestation by 30 June
D. Discuss the hand hygiene problem at the next staff meeting

C. Day-shift nurses complete the hand hygiene attestation by 30 June Only the first names readers, an observable action and a date, so an outsider could tell whether it worked.

6. A writer explains a failed equipment check to a family and to a compliance officer. What may differ between the two accounts?

A. The facts, as long as each account stays kind
B. Vocabulary, depth and emphasis, but never the facts
C. Only the greeting and the closing line of each
D. Nothing at all; both accounts must use identical wording

B. Vocabulary, depth and emphasis, but never the facts Adaptation omits what a reader cannot use. It never shades what is inconvenient.

7. What does the chapter say about team chat?

A. It is written like conversation but kept like email
B. It is deleted automatically once a conversation ends
C. It is the best channel for discipline and blame
D. It cannot be produced in a legal proceeding

A. It is written like conversation but kept like email Speed of typing says nothing about how long the message is stored or whether it is discoverable.

8. In PACT, what does the T stand for?

A. Tone of voice
B. Timing of the send
C. Topic sentence
D. Test of success

D. Test of success PACT is Person, Aim, Constraints and channel, Test: the observable thing that shows the message worked.

9. How do Bitzer and Vatz differ on the rhetorical situation?

A. Bitzer says situations call for discourse; Vatz says writers construct them
B. Bitzer says writers construct situations; Vatz says situations call for them
C. Bitzer and Vatz both say the audience alone decides what gets written
D. Bitzer and Vatz both reject the idea of any constraint on the writer

A. Bitzer says situations call for discourse; Vatz says writers construct them Bitzer (1968) described exigence, audience and constraints. Vatz (1973) argued writers choose what deserves attention. Both agree outside forces shape the writing.

10. You find an error in a record you filed yesterday. What should you do?

A. Edit the original quietly so it reads correctly
B. Add a dated, attributed addendum or late entry
C. Delete your copy and file a new clean record
D. Leave it alone, since records cannot be changed

B. Add a dated, attributed addendum or late entry A visible correction looks careful. A silent edit looks like concealment, and deleting your copy does not delete the organization's copy.

CHAPTER 2

Professional Email and Correspondence

Read it in full: **Chapter 2 in the textbook**. Practice it in the lab: **Thread Triage** and **Assemble the Ask**.

What to know

Email is the paperwork of modern work: dozens of small documents a day, each permanent, forwardable and often discoverable. Most bad emails are not badly written. They are correct messages sent through the wrong pipe.

The **channel-fit test** asks four questions: how complex is it, how much emotion is in it, how fast do you need an answer, and do you need a record? High complexity, low emotion and a need for a

record is email's home ground. High emotion plus urgency belongs on a phone or in a hallway. High complexity plus high emotion, such as a performance concern, belongs in a conversation followed by a short written summary: **talk first, confirm in writing**. If you cannot say what you want the reader to do, do not send yet.

Email does four things well: it is asynchronous, precise, carries payload (attachments, tables, schedules) and makes a timestamped record. It fails at negotiation, at changing someone's mind, at urgent clinical communication and at conflict. The **three-reply rule**: if a thread reaches a third round with no decision, the channel is wrong. Call, then send one message beginning "Following up on our call: here is what we agreed."

The subject line is the only part guaranteed to be read. Treat it as a filename, not a headline: topic, action and date, distinguishing word first, because phone previews cut off at roughly forty to sixty characters. Write it last. The salutation signals the relationship; mirror your correspondent and go one notch more formal until invited otherwise. Use the credential the person uses. The signature block gives full name, role, unit, organization and one reliable phone number. The first sentence is the whole email for many readers, so do not waste it on "I hope this email finds you well."

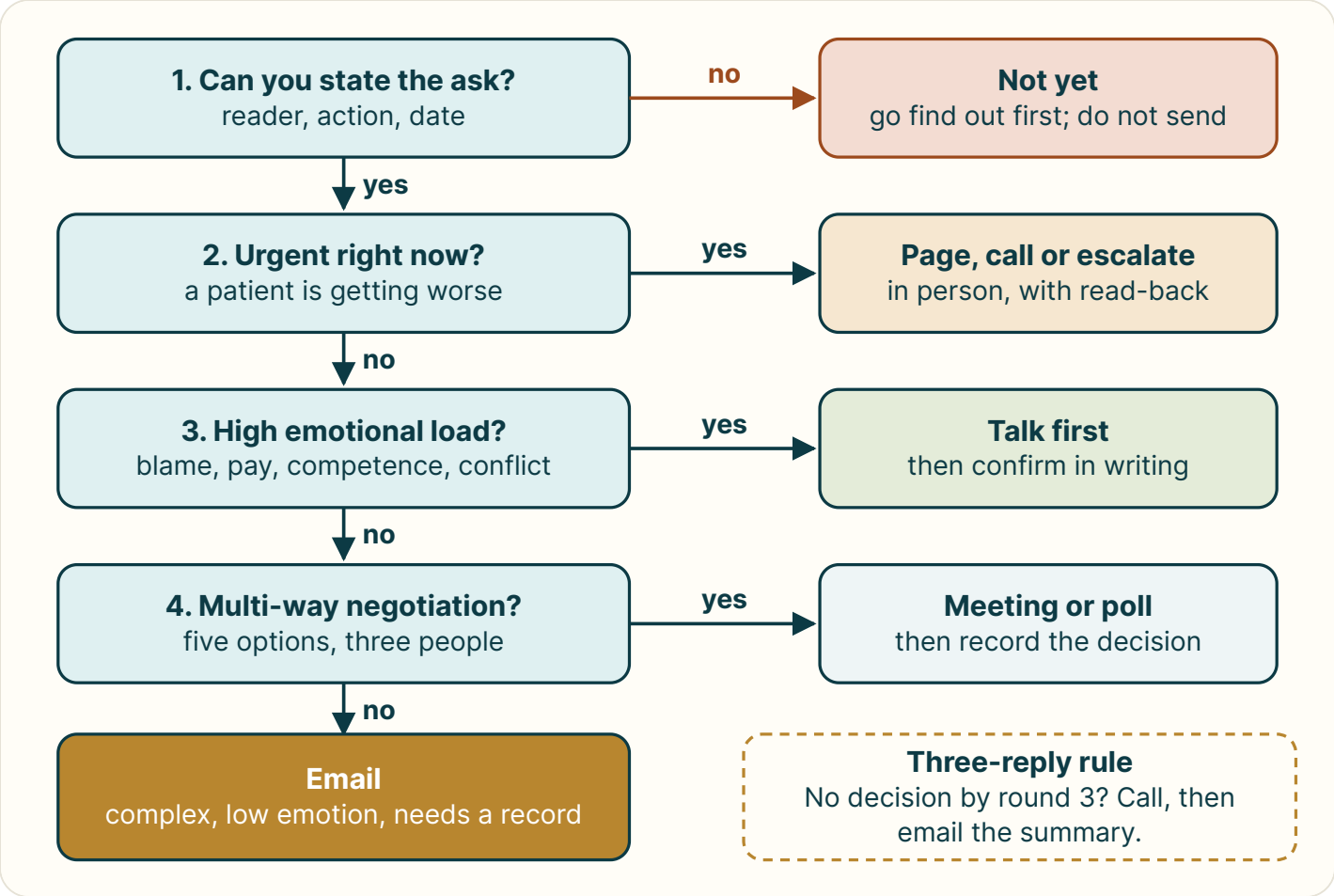
BLUF means the first two sentences say what it is about, what you want and by when. The one exception is genuinely bad or unwelcome news, where one sentence of **buffer** comes first. Every ask names the actor, the action and the date, with an optional fourth slot: what happens if the date slips. "Please advise" and "someone should look into this" fail because diffusion of responsibility is arithmetic. When nothing is needed, say "No action needed." Format for scanning: short paragraphs, labeled lists for three or more parallel items, bold only the load-bearing element, no ALL CAPS, no color alone. One email, one job.

Register is set by distance, power and weight; raise formality when any one goes up. Over-formality with a close colleague signals that something is wrong. Hedges are not errors; the problem is dosage. Hedge the relationship, never the requirement or a safety issue. The evidence on deleting "just" and "sorry" is mixed. Bad news takes a one-sentence buffer, the news, a brief reason and a forward path. A refusal declines the request, not the person. A working apology has four parts: name what happened, take your part, state the correction, state the prevention. Angry drafts wait an hour with the recipient field empty.

To means act; CC means awareness only; BCC is a hidden copy, clean for mass mailings and for an announced move off a thread, a trust bomb when used to let someone watch. Reply-all only when every person needs the sentence. Before forwarding, scroll to the bottom and trim. A mis-sent message with PHI is an impermissible disclosure under HIPAA that must be assessed and, unless the risk is shown to be low, reported; FERPA restricts disclosure of student records and requires the disclosure to be recorded but has no breach-notification requirement. Fill in the address last.

LOCK THESE IN

- Channel-fit: complexity, emotion, urgency, need for a record. Talk first, confirm in writing for high emotion plus complexity.
- Three-reply rule: no decision by the third round means change the channel.
- Subject line = filename: topic, action, date, under about sixty characters, written last.
- BLUF in the first two sentences; a one-sentence buffer only for genuinely bad news.
- Every ask: actor, action, date, plus the consequence if the date slips. Say "No action needed" when true.
- Register rises with distance, power and weight. Hedge the relationship, never the requirement.
- Apology: what happened, your part, the correction, the prevention.
- To acts, CC is informed, BCC is hidden. Trim forwards. Address last.



The channel-fit test. Ask four questions before you type. Email wins only when the content is complex, the emotion is low and a record matters.

Key terms and comparisons

Term	What it means	Use it for
Asynchronous	Both sides need not be present at once	Email's defining strength
Buffer	One neutral sentence before unwelcome news	Bad news only; one sentence, not a paragraph
Chunking	Short single-idea paragraphs and labeled lists	Messages a reader will scan
Hedge	Softening word: maybe, I think, when you get a chance	The relationship, never the deadline
Escalation	Raising a matter to higher authority or a stronger channel	Announce it; covert escalation damages trust
Signature block	Name, role, unit, organization, phone	So a reader can reach you without searching
PHI	Individually identifiable health information	Restricted by HIPAA; never in a subject line
FERPA	U.S. law on student education records	Restricts disclosure, logs it; no breach-notification duty

Recipient fields

Field	Means	Common misuse
To	You must act or reply	Six people in To and no one named
CC	For your awareness only	Copying a manager as silent pressure
BCC	Hidden copy	Secretly looping in a third party mid-conflict
Reply	Answer the sender only	Rarely misused; the safe default
Reply-all	Answer everyone	"Thanks!" and "+1" to a list
Forward	Send the thread onward	Passing on candid remarks buried in the chain

Salutations and sign-offs

Relationship	Opening	Sign-off
External, first contact, senior	Dear Dr. Whitfield,	Sincerely,
Internal, senior, established	Hi Dr. Whitfield,	Thank you,
Peer, established	Hi Imani,	Thanks,
Group announcement	Hi all, / Good morning, team,	Thanks,
Active thread, same day	(none)	First name
Conflict or complaint	Dear Ms. Okafor,	Sincerely, (formality de-escalates)

Worked cases

WORKED CASE 1 · CHOOSING THE CHANNEL

Rosa's colleague has turned in documentation late three weeks running. Rosa wants it to stop and wants a record that she raised it. Which channel, and in what order?

STEP 1 · SCORE COMPLEXITY

Moderate: one pattern, one expectation.

STEP 2 · SCORE EMOTION

High. It touches the colleague's competence, so text alone invites a defensive reading.

STEP 3 · SCORE THE NEED FOR A RECORD

High. A repeated pattern should be documented.

STEP 4 · PICK

Talk first, confirm in writing. Rosa speaks with the colleague, then sends a short neutral email summarizing what was agreed.

WORKED CASE 2 · REWRITING SUBJECT LINES

Fix three subject lines: "Question", "Important!! Please read" and "Re: Re: Re: Fwd: schedule".

STEP 1 · NAME THE TOPIC AND THE QUESTION

"Fall-risk protocol: which form replaces the old 4B?"

STEP 2 · TRADE FAKE URGENCY FOR A REAL DEADLINE

"Action needed by Fri 3/20: sign updated HIPAA attestation"

STEP 3 · RESET A MUTATED THREAD

"Reset: June schedule: 3 open weekend shifts"

CHECK IT A SECOND WAY

Read only the first forty-five characters of each, as a phone would. Each still shows the topic, so the line still works when cut off.

WORKED CASE 3 · BUILDING A FULL ASK

Turn "We should update the orientation packet soon" into an actionable request.

STEP 1 · ACTOR

Dana.

STEP 2 · ACTION

Update pages 4 to 9 of the orientation packet.

STEP 3 · DATE

By 4/10.

STEP 4 · THE OPTIONAL FOURTH SLOT

Say what happens if the date slips, as information: if the pages are not ready, the packet goes out with the old pages and is corrected next cycle.

THE FINISHED ASK

"Dana, can you update pages 4 to 9 of the orientation packet by 4/10? I will handle the appendix."

WORKED CASE 4 · A FOUR-PART APOLOGY

Discharge instructions Lee sent on Tuesday listed the wrong follow-up date. Draft the apology.

STEP 1 · NAME WHAT HAPPENED

"The discharge instructions I sent Tuesday listed the wrong follow-up date."

STEP 2 · TAKE YOUR PART

"That was my error."

STEP 3 · STATE THE CORRECTION

"I called the family this morning and corrected it."

STEP 4 · STATE THE PREVENTION

"I have added a date check to the template before it prints."

CHECK

No "sorry you were frustrated" and no long self-focused paragraph. In clinical settings, follow risk-management guidance on written apologies about patient events.

TRAPS PEOPLE FALL INTO

- **Fixing wording when the channel is wrong.** A third reply with no decision means call, not rewrite.
- **"Quick question" as a subject.** It describes your intent, not the reader's business, and cannot be searched later.
- **Warmth before the point.** "Hope the move went smoothly" belongs in sentence three, after the ask.
- **Hedging the deadline.** "If you get a chance" tells the reader a 72-hour requirement is optional.
- **A long buffer.** One sentence of context before bad news, not a paragraph. Long preambles raise anxiety.
- **CC as pressure.** Copying a manager silently reads as escalation. Say why you are copying them.
- **BCC to let someone watch.** One reflexive reply-all exposes the observer to everyone.
- **Trusting recall.** Recall works only inside your organization and only sometimes. Report a mis-send at once.

Chapter 2 self-test · ten items

1. Which situation is email's home ground according to the channel-fit test?

A. Urgent content, high emotion, and no record needed
B. Complex content, low emotion, and a record is needed
C. Simple content, high emotion, and a quick reply needed
D. Many-way negotiation among five scheduling options

B. Complex content, low emotion, and a record is needed Email is asynchronous, precise and makes a record, so it suits complex, low-emotion business that must be findable later.

2. A thread reaches its third exchange without a decision. What does the chapter advise?

A. Write a longer, more detailed fourth email to everyone on it
B. Add the manager to CC so the thread finally moves on
C. Move to a call, then email a summary of what was agreed
D. Reply-all with a numbered list of every open question

C. Move to a call, then email a summary of what was agreed The three-reply rule says the channel is now the problem, not the wording.

3. Why should a subject line be treated like a filename?

A. It is how the message is triaged, filed and searched later
B. It must match the name of any attached file exactly, always
C. It is read only by the email server, not by people
D. It should be written first, before the message body

A. It is how the message is triaged, filed and searched later The subject decides if the message is opened, labels it in the archive, and is the search term someone types months later. Write it last.

4. When is a one-sentence buffer before the main point appropriate?

A. When the reader is senior and must be greeted warmly first
B. When the message is short and needs to feel friendlier
C. When the writer is unsure what the main point should be
D. When the news is genuinely bad or the request unwelcome

D. When the news is genuinely bad or the request unwelcome Outside bad or unwelcome news, BLUF leads with the point. The buffer is one sentence, not a paragraph.

5. Why does "Someone should look into this" sent to six people usually fail?

A. No actor is named, so each reader assumes another will act
B. The tone is far too formal for a group of six close colleagues
C. It is missing a greeting and a proper signature block
D. It uses the passive voice, which readers cannot follow

A. No actor is named, so each reader assumes another will act Diffusion of responsibility is arithmetic, not a character flaw. Name the actor, the action and the date.

6. What three variables set register in email?

A. Length, speed and format
B. Topic, channel and timing
C. Distance, power and weight
D. Spelling, grammar and tone

C. Distance, power and weight Raise formality when you know the reader less, when they hold more power, or when the message is more consequential.

7. Which revision hedges the relationship but keeps the requirement firm?

A. Just wondering if you might look at the form sometime
B. Send me the form now. It is due, and you already know it is due
C. No rush at all on the form, whenever you get a sec
D. Sorry to add to your week: the form is due Thursday at 5

D. Sorry to add to your week: the form is due Thursday at 5 The softener is aimed at the person while the deadline stays unmistakable.

8. What are the four parts of an apology that works in professional email?

A. A greeting, an excuse, a promise, and a warm sign-off
B. What happened, your part, the correction, the prevention
C. Regret, feelings, reassurance, and a request to move on
D. The cause, who else was at fault, the fix, and a thank you

B. What happened, your part, the correction, the prevention "Sorry you were frustrated" names no wrong, and an over-apology asks the injured party to reassure you.

9. Which use of BCC does the chapter treat as clean?

A. Letting your manager quietly watch a tense conversation
B. Copying a vendor in secret so that a colleague never finds out
C. Hiding a third party who will judge a coworker's reply
D. Sending to a large list so recipients cannot see addresses

D. Sending to a large list so recipients cannot see addresses BCC protects addresses in mass mailings, and an announced move off a thread is also fine. Covert observation is a trust bomb.

10. How does FERPA differ from HIPAA for a mis-sent message?

A. FERPA has no breach-notification requirement of its own
B. FERPA requires notifying every student within 72 hours
C. FERPA covers health records and HIPAA covers school records
D. FERPA allows any disclosure once a student turns eighteen

A. FERPA has no breach-notification requirement of its own FERPA restricts disclosure and requires it to be recorded, but any duty to notify comes from state law or policy. HIPAA has a breach notification rule.

Cram sheet

Everything from chapters 1 and 2 in one place. Cover the right column and see if you can rebuild each row.

Patterns to know

Pattern	The shape	Note
Action request	I need [who] to [do what] by [when] so that [consequence]	No deadline = suggestion; no name = nobody
Purpose statement	After reading this, [reader] will [action] by [date], because [reason]	Write it at the top; delete before sending
BLUF	First two sentences: what about, what you want, by when	From U.S. military staff writing
Subject line	Topic + action + date, distinguishing word first	Phone previews cut at about 40 to 60 characters
Full ask	Actor + action + date (+ consequence if late)	"No action needed" when nothing is
Bad news	One-sentence buffer, the news, brief reason, forward path	Reason after the news, not before
Apology	What happened, your part, correction, prevention	Follow risk policy for patient events
Follow-up	"Following up on my 3/2 request" + the ask + a new date	No "as I mentioned twice already"

Lists to know

List	Items
Four readers	Primary, gatekeeper, secondary, tertiary
Four jobs	Inform, request, persuade, record (plus keeping the relationship)
Channel variables	Complexity, speed or urgency, emotional load, need for a record
Constraints	Time, policy, privacy (HIPAA, FERPA), hierarchy, accessibility
PACT	Person, Aim, Constraints and channel, Test
Register dial	Distance, power, weight
Audience profile	Who acts, what they know, what is at stake, what they will object to, what they need to say yes
Email strengths	Asynchronous, precise, carries payload, timestamped record

Rules that are not formulas

Topic	The rule
Mixed audience	Body for the least technical reader who must act; depth in an attachment.
Adaptation	Change emphasis, vocabulary, depth; never the facts.
Channel	Bad news and negotiation to voice; the record to writing.
Three-reply rule	No decision by round three: call, then summarize by email.
Hedging	Soften the relationship, never the requirement or safety.
Records	Observed fact only; correct with a dated, attributed addendum.
Recipients	To acts, CC informed, BCC hidden; address last; trim forwards.
Ten-second test	A colleague must be able to say what you want and by when.

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