

CHATting in the Workplace

M. Irene Taylor &
Jeff Rients

Jeff Rients and M. Irene Taylor, non-traditional students currently pursuing graduate degrees in English Studies, discuss the conventions of specific genres in their respective professions. Jeff, who recently left the banking industry, talked about the foreclosure letter, and Irene, a former administrative assistant, explained the work order form. In reviewing the transcript of their conversation, they discovered that Cultural Historical Activity Theory (CHAT) is applicable as much in the workplace as in any classroom or research project.

Upon returning to the university after having spent many years in the workplace, Irene Taylor and Jeff Rients decided to put their heads together to reflect on the use of writing in an office environment. The following transcript condenses and streamlines many hours of conversation held over several months, including both face-to-face communication and email exchanges.

Highlighted throughout this article are examples that clarify the terminology used in the application of CHAT to the writing process. This terminology includes Production (both the tools and practices used to create a text); Representation (issues related to the way people conceptualize and plan the creation of a text); Distribution (consideration of who receives the text, for what purpose, and by what means); Reception (how a text is taken up and used by others, how they might re-purpose the text, and how the text is constrained); Socialization (the interaction of people as they produce, distribute, and use texts and how this relates to the cultural norms of an institution); Activity (the actions involved in producing texts); and Ecology (the physical, biological forces that exist beyond the boundaries of any text). For more on CHAT, see Joyce Walker's "Just CHATting" in *Grassroots Writing Research Journal* issue 1.0.

Jeff: We are here to talk about the forms of written communication we used in our previous professions.

Irene: Yes. I will be talking of my work as an office support staff member, and I believe you were in banking—customer service. Is that right?

Jeff: Yes. My primary responsibility was communicating with banking clients who were past due on their house payments.

Irene: In my last position, I was responsible for designing the work order form (Figure 1) and ensuring that it was as clear and concise, even as simple as possible. By this I mean that completing this form had to pose a minimal disruption to a faculty member's routine.

DEPARTMENT OF ENGLISH -- WORK ORDER	
FROM: _____	Today's Date: _____ Today's Time: _____
_____ Date needed	_____ Time needed
<u>Please let staff member know if the request requires less than a 24-hour workday turn-over time.</u>	
_____ SCANNING REQUEST (Limit of 10% per book or journal)	
(Please provide title) _____	
_____ HARD COPIES (Limit of 10% per book or journal)	
_____ No. needed	_____ Number of pages attached
<input type="checkbox"/> Check here if you want color paper. <input type="checkbox"/> If you have a preference, please indicate.	
<u>ALL hard copies will be run front to back and will be collated and stapled UNLESS otherwise noted below:</u>	
<input type="checkbox"/> Check here if you do NOT want us to run the order front to back.	
<input type="checkbox"/> Check here if you do NOT want us to collate and staple.	
Work order run by: _____ (worker's initials) collated by: _____ (worker's initials)	

Figure 1. Department of English work order form.

Jeff: I see. So just to be clear, in your particular office, which was in an academic setting, the work order was a tool used by faculty to inform the staff of their needs. For example, I need this particular item copied by this particular time.

Irene: Right. The form allows the faculty member to tell me what I need to do in order to give them what they need in the classroom.

Jeff: I see. Could you explain what you mean when you say “this form had to pose a minimal disruption to a faculty member's routine”?

Irene: Well, a faculty member has many responsibilities to meet in any given day. S/he doesn't have the time, or patience for that matter, to spend

RECEPTION:
Consideration of a reader's reaction to a text is critical, especially when the goal is to secure a specific action as is the case with the work order.

deciphering a form so detailed that it requires careful review of what one has entered once it's completed.

Jeff: It's not like they're filing taxes after all.

Irene: Exactly. And in that same vein, we aren't writing a newspaper article. The "who/what/when/where/why" doesn't apply. OK, that's not quite true; we are asking for "who" (the faculty member's name), "when" (date and time needed), and "what" (number of copies needed). Of course, as digital technology plays a more prominent role in the department office, the number needed has taken a back seat to a different "what": a title.

Jeff: I'm not sure I understand.

Irene: What we're seeing now, at least on the university campus, is the paperless classroom, which means a prevalence of digital copies (PDFs, for example) replacing hard copies. Some departments are even using digital exams projected on a screen. So to ensure accuracy and clarity, I asked that faculty members provide us with a file name for their documents, one they believe the student can readily find online.

Jeff: Can't you do that?

Irene: We could, but I preferred that it be the faculty member's call. They know their students; they also know how they commonly refer to these articles. Some faculty use the author's name, some use the title. For consistency's sake, I liked them to decide.

Jeff: So that was on the form?

Irene: It was on the form, but it wasn't always filled in.

Jeff: Why do you think that's the case?

Irene: Because it was a change from the norm. To draw attention to a change, you have to make something more prominent. But when you do that, you give it an importance that doesn't apply. It's breaking the convention in a way that isn't appropriate. It became a Catch 22. If I didn't give this part of the form prominence, it was missed. But if I did, it took on a level of importance it shouldn't have had.

REPRESENTATION:
Visual rhetoric can
play a significant role
in any genre.

Jeff: So what was your solution?

Irene: Well, I changed the design of the form in order to grab people's attention while not giving too much prominence to the title request. It worked to a degree in that the faculty couldn't fill it out by rote. It caught their attention, but it had a simplicity that I liked.

Jeff: Did it work?

Irene: Sure. Well, to a degree. I have to admit, I still engaged in a number of follow-up calls securing the information I needed.

Jeff: In preparation for this discussion, I went to a few different departments on campus and talked to them about how work orders are processed. One department said, “Oh, we have some laying around. Hardly anyone uses them anymore. We just get an e-mail that says, ‘Here’s a file. I want you to print 25 of them.’” Also, each department had its own form. There was nothing uniform, which I found interesting.

Irene: The work order is not uniform. Departments are unique and have their own needs and priorities.

Jeff: And one department, I believe it was Chemistry (Figure 2), had *typing* as an option on what the staff readily admitted is a rarely used form. None of the other work orders show that.

Irene: That was an old format. I can’t remember the last time I actually typed a document, even an exam, for any faculty member.

Jeff: Because of the advancement of office technology?

Irene: When I first came to ISU to work, my area was called the “Typing Pool.” I won’t say how many years ago that was, but even then, the title was a misnomer. I don’t mean to get off the subject, but computer technology has had such a dramatic impact on the workplace, so much so that even something as simple as the genre of the work order has been affected.

Jeff: The advent of computer technology has impacted the private sector as well. In the time I worked in banking, I saw computers being brought into

WORK REQUEST	
Today’s Date	_____
Date & Time Needed	_____
Work Description:	
Number of Copies	_____
Typing	_____
Photocopying	_____
Double-Sided	_____
Collated	_____
Stapled	_____
Colored Paper:	
Yellow	_____
Blue	_____
Green	_____
Pink	_____
Instructor	_____
Additional Instructions → (over	

PRODUCTION:
Obsolete or not,
the technology we
are using impacts
decisions we make
in creating a final
product.

Figure 2. Department of Chemistry work order form.

individual offices and that made a big difference in my approach to writing. When I first started, I would dictate letters and my assistant would then type them up. By the time I left, however, I was composing letters myself using a computer. This not only eliminated that middle person (allowing him to focus on other tasks), but it also allowed me the opportunity to edit and personalize the letters more than I could before. I could give added attention to the tone and effectiveness of each message as opposed to waiting for a letter I had dictated to come back to me for approval. This was especially important for those times when I would find myself frustrated with a customer, for whatever reason, but couldn't risk letting that frustration come through in my writing. I believed it was my responsibility to help the homeowners even when they didn't always recognize that fact, and it was important that my correspondence always reflected that commitment.

REPRESENTATION: In formal genres, the tone of one's writing can be as important as grammar, spelling, punctuation, and organization.

Irene: That's interesting. It brings up an important point about writing. You don't want your tone to negatively influence how the reader reacts to the message. I find that e-mail communications can inaccurately convey emotions. For example, "thank you" ending with a period is much more formal, even detached, than if it is followed by an exclamation point.

Jeff: I found it much easier to be misinterpreted in an e-mail than over the phone or face-to-face, especially if I would shoot off an e-mail in a hurry, like I would to a friend. But there's also a dynamic that exists in these two genres that has nothing to do with speed or content. For example, the same text that appears in e-mail would have an entirely different impact if it appeared in a letter. The simple fact that there would be an envelope with letterhead makes it look more official; that's the effect of the heavy-weight paper with a full color logo. A letter was an official communication from a bank, which carried more weight than getting an e-mail from some guy named Jeff. Even an e-mail with properly formal wording could send a different message about the seriousness of the situation.

DISTRIBUTION, PRODUCTION, & ECOLOGY: The medium used as well as how the message is produced and delivered affects how it is received.

Irene: Well, given the subject matter, you wanted to give your clients the feeling that you (or your company) were willing to make that investment in the nice paper or color ink or first class postage. It gave it gravitas.

Jeff: Absolutely.

Irene: So, to be clear, the primary genre of communication you had with your customers was the formal letter, and you were responsible for the content in the initial efforts at communication. You worked in steps. You composed the initial letters, but at some point, the form letter came into play. It was the final step.

Foreclosure Letter Sample Breach

Date

Borrower Name
Address
City, State, Zip

Re: Loan #

Property address

Dear Borrower:

You have fallen behind on your mortgage payments. You must bring the mortgage current within 30 days of the date of this letter by sending the amount shown below to [company name] in the form of a money order or certified check.

The total amount due as of [date] is \$ _____.

To bring your account current, you must also include with the above payment, any payments or late charges that are due during this 30-day period. Acceptance of less than the total amount due includes, but is not limited to, the principal and interest and all other outstanding charges and costs. Acceptance of less than the total amount due does not waive our right to demand the entire balance due under the terms of your mortgage agreement.

If you do not bring your loan current within 30 days of the date of this letter, [name of company] will demand the entire balance outstanding under the terms of your mortgage agreement. This amount includes, but is not limited to, the principal and interest and all other outstanding charges and costs. [Name of company] will start legal action to foreclose on the mortgage, which will result in the sale of the property. We may also have the right to seek a judgment against you for any deficiency after the home is sold.

You have the right to bring your loan current after legal action has begun. You also have the right to assert in the foreclosure proceeding the nonexistence of the default or any other defense to our legal action and sale of the property.

We want to work with you to resolve the problem and help you bring your account into good standing. We urge you to contact [name] at [telephone number] who will work with you to try to solve your current difficulty.

Sincerely,

Signature

Figure 3. Breach of Mortgage Notice or the Default Letter.

Jeff: Yes. There is one class of letter that is called the Breach of Mortgage Notice or the Default Letter (Figure 3). I sent this letter when someone had reached their third payment past due. I didn't get to choose what was in the text of that letter. That format is set by an industry standard and the wording is approved by lawyers. I'm not a fan of these sorts of standardized communications, as they effectively treat all customers as if they were in the exact same situation, which they are not. But these standards are in

place to help insure everyone is properly notified that there is a problem with their account.

Before that point, the first communication to the customer was a late fee notice that was automatically generated. It is a very short form letter that typically was sent out when a payment was fifteen days late. It basically said a late fee had been assessed. One of my great personal victories at the first bank where I worked was when I convinced management to add my phone number on the bottom of that letter. Previously, customers would only see a 1-800 number, and then they'd bounce around the voicemail system trying to find the right person. By adding my direct line, clients could actually reach the Collections Department immediately so we could start early working out a solution to their problem. Other than that small gain, I had no input on the wording of that text, but at least it could put me in touch with the customer.

SOCIALIZATION:
What sort of texts we produce is bounded by institutional forces such as laws, corporate policies, or club rules. That's not to say we can't influence those forces.

Typically at the thirty-day past due mark, when a second payment came due, I got to determine the content of the letter. I would usually say, especially if it was my first communication with a customer, something very straightforward like, "Our records indicate that your account is now past due. Please contact me so that we can discuss it." That was usually the main thrust of my letters. Ideally this would lead to a phone conversation, and I could start making inquiries like, "What's the problem? Are you mad at the bank and not sending payments out of protest? Is it that you are unable to make payments, and can I help to work out a new note?"

Most of the letters were my attempt to open up a dialogue. I could do this until we reached the sixty-day point, at which I was obliged to inform the customer that he or she was in danger of foreclosure. So the normal progression would be an automatically generated, very short late fee notice, at least one attempt from me of a letter basically begging for contact, and then advising the clients of their rights and informing them that they were looking at foreclosure in one month. But prior to that, if I could get a dialogue started, I would instead send the customers letters saying, "Hey, I thought we were going to get together for an appointment? You didn't come in. Are you still wanting to work something out?"

Irene: It sounds like you would use a more informal or at least a friendlier tone in your initial communications. I could see how this might be frustrating. Knowing you as I do, I'm sure your first priority was the well-being of the customers, doing all you could to see they kept their homes. At some point, it must have gotten frustrating, especially when dealing with people who didn't want to respond. At those times, did you take a day—I mean in terms of the emotions—to pull back, or did you not have that luxury?

ACTIVITY: Emotions can play a significant role in the practice and habits that go into the composing process.

Jeff: Most of the time you could wait, especially if you were feeling really intense about a situation. Everybody I ever worked with took the idea of filing a foreclosure very seriously and would be upset whenever they had to do that. I once saw a co-worker break down in tears for not being able to avoid a foreclosure. So we would talk it out as a unit. I would never fly solo on this sort of thing.

Irene: Given the gravity of this work, when you came into the position, were you given any training on writing these kinds of letters, or did your employers assume you had this skill already in place?

Jeff: I received very little training. There was just an assumption that if I could get dressed and come to work in the morning then I would know how to write a letter, apparently.

Irene: Did you come in with a degree?

Jeff: Yeah, I had a Bachelor's in English literature at the time.

Irene: So your employers assumed that if a person had a college degree, he or she could write letters.

Jeff: Right. But the truth was that I was not acquainted with the genre of the formal business letter. So I would go through previous files that had gone out to customers and get a feel for what that kind of letter looked like. For a long time, I just worked off of other people's old files. Then I worked out a relationship with our attorneys; they would advise me when my letter was out of date due to changes in the law and tell me what I needed to do to bring them up-to-date. Eventually I developed my own voice. At first I would sometimes have customers call in angry because of the way I had worded the letter. So I would go back and talk with my colleagues. I'd ask them, "What can I do to get the customers to call in but not be upset?" What I discovered was that I had previously been writing, "Your account is past due." And so many customers called in angry, saying, "Well that's wrong. I sent in payments." Maybe they did, maybe they didn't. Either way, we needed to talk. So I revised my letter to say "My records show such and such. Could you call me about this?"

REPRESENTATION: The writer needs to be sensitive to how a message will be received in order to garner the response needed.

Irene: You took ownership of the problem. It made them feel less threatened, less defensive, and the lines of communication opened up.

Jeff: Right. That's why I would say "my records" and not "our records." I was trying to communicate the idea that this was a one-on-one conversation.

Irene: It's interesting. I found I needed to adopt that philosophy as well. It's important to take ownership. As someone serving a clientele, or in my

case, supporting a certain community of professionals, I wanted to avoid a confrontational tone. It all goes back to the idea of “taking a moment.” We were both serving an audience, and we needed to leave the person open to our message. I relied heavily on e-mail in my position, so written communication became a very important component in the process, before, during, and even after a work order had been completed. I couldn’t e-mail someone with a message reading: “I can’t waste department resources scanning or copying an original that’s not readable.” Instead I would write, “Before I process this work order, I want you to know that the text is not clear (either it is cut off, a section is missing, or the print is unreadable). Do you have an original that we might use to secure a cleaner copy?”

Jeff: I find it interesting that the quality of the original can affect reception two steps removed from the original work order. There’s an audience you’re not seeing—the student in the classroom—who could be impacted by how a work order is processed.

Irene: Am I getting off topic?

Jeff: No, I don’t think so. You’re talking about your direct audience, the faculty member, but there is another audience, the student, whom you never see.

Irene: Is that trajectory?

Jeff: You know, it just might be.

Irene: I have one more question I’d like to ask you, and I wrote it out in advance. So here it is: “There aren’t many professions out there that don’t require writing in some genre, whether it’s the waitress putting in a food order or a banker writing a foreclosure notice. It was your writing skills that secured your position in your former job, but I’m thinking it is that same skill that allowed you the option to walk away. You are now in an environment that asks you to work in a wide range of genres, from designing a class syllabus, to filling out a class preference form, to writing response papers. In both of our cases, we are moving from the ‘work world’ back into academia, but most of the people reading this article are going in the opposite direction. Do you have any advice to someone reading this article about making such a transition?”

Jeff: The thing that I found the most useful was that when asked to produce something, I would ask for some examples or find a file that had some examples in it. Don’t hesitate to ask the person requesting the item if they have some examples you could look at. So if you can get your boss to say, “Here’s a memo I sent to my boss,” then that will give you a clue as to what your boss wants to see in the memos you write. Also, don’t be afraid to snoop

RECEPTION: By “trajectory” we mean the way a text goes out into the world and does work. We don’t always get to see the ways our texts operate, but we can at least attempt to plan for how they will be taken up by various audiences.

ACTIVITY: Writing research doesn’t only happen in school environments. It’s a tool that you’ll also need for non-academic work.

around for reference material. I knew nothing about the law, but I was able to find a famous reference book called *Black's Law* that was extremely helpful. There are reference books for all kinds of professions. They are out there. Find them.

Irene: That brings up something I discovered while doing the research for this discussion and that is the issue of research or securing information. I'll be honest: I wasn't comfortable going into a bank and asking if I could have a copy of a foreclosure letter or even a template, so I relied on Google. You are absolutely right when you point out that talking to *people* is an important tool for research. I believe this was the first time I did formal research for an assignment that the search engine let me down. After many versions of my search topics—"foreclosure letter," "bank foreclosure letter," "letter template for bank foreclosure"—I finally found *one* example from a bank. And that same template showed up on several different sites.

What I had absolutely no trouble finding were templates of letters responding to foreclosures. It is a cottage industry out there, as most of these sites offered "free trials." So if you wanted to use the letter, or if you needed more assistance composing such a letter, services were available for a price. I realized I would have to rely on my conversation with you to get the information I needed.

Jeff: Well, we probably should be wrapping up. This has been a very interesting discussion. I learned a lot about your work.

Irene: As I did about yours. I'm pleasantly surprised to see the commonalities in what we did, or at least in the responsibilities we provided for our respective clientele.

Jeff: That's very true. How we communicate carries weight, doesn't it? Well, thank you.

Irene: Thank you. It's been fun.



M. Irene Taylor studied acting at the University of Illinois and went on to earn her M.A. in theatre at Illinois State University. She recently performed her original one-woman play *Suppos'd to* as the debut production of the New Route Theatre's main stage season. She saw two of her poems published in the 2012 McLean County Barn Quilt Heritage Trail "Words on Quilts" and has been asked to write for the 2013 publication. She is coordinator of New Route Theatre's Creative Writing for Seniors program and a doctoral student in ISU's Department of English.

Jeff Rients holds a Bachelor's degree in English from the University of Illinois and a Master's from Illinois State University. In between those two degrees he worked in banking for seventeen years. He is currently pursuing his Ph.D. at ISU's Department of English. He is an avid *Dungeons & Dragons* referee and his publications in this field include *The Miscellaneum of Cinder*, *Under Xylarthen's Tower* and the forthcoming *Broodmother Skyfortress*, as well as contributions to *Fight On!*, *Open Game Table*, *Hekatoteratos*, *Green Devil Face*, *Crawl!* and *Encounter*.