

So What's a Quad Chart, Exactly?: Exercises in Genre

Erin Frost

In this article, Frost details her experience with an unfamiliar genre—the quad chart. She explains the methodology behind her investigation of the genre, which involves doing research, consulting professionals, and producing the genre. Additionally, Erin examines the benefits of doing in-depth analyses when interacting with new genres.

Not too long ago, a student at the Missouri University of Science and Technology approached his professor for help. The student said that a proposal he was writing had to include a quad chart.

Hearing this story later, my first thought was: Huh? The only *quad* I know is the muscle. Why would a proposal need to include some sort of exercise chart?

Now, the professor in question, Kathryn Northcut, was a little savvier than that. No surprise there; Northcut is an experienced technical communication instructor and scholar. However, although she didn't think it had to do with exercise, she had never heard of a quad chart before either. So she sent out an email to the listserv for the Association of Teachers of Technical Writing.

I'm sitting at my desk trying to avoid homework when I receive this email.

[attw-l] Quad Chart teaching question



Figure 1: Email from Dr. Northcut about Quad Charts

At this point, I'm unsure of how to answer Dr. Northcut's question. More than that, my mistake in thinking a quad chart had something to do with tracking workout time reminds me how long it's been since I went to the gym. And it makes me feel even guiltier about the chocolate doughnut on my desk and the detective novel I've been reading during the time designated "rec center" on my weekly schedule. But...I'm a technical communicator, and a teacher, so don't I have an obligation to know what a quad chart really is? Wouldn't my time be better spent researching (and eating my doughnut) than selfishly going to the gym?

Research it is.

So I type "quad chart" into Google, and the first likely looking search result is at www.bids.tswg.gov/Content/QuadCharts.htm. This turns out to be one of those sites that has unannounced audio, and I'm so surprised I almost drop my doughnut onto my keyboard. Despite the surprise, the site is pretty helpful, and so are a couple other sites I find. It turns out that a quad chart is a one-page document—usually used to introduce a new product or offer a solution to a problem—that is divided into four sections (thus the *quad*). Lots of times it's the front page or summary of a lengthy proposal, or it's the document that gets you permission to submit a lengthy proposal. My dad is a civil engineer who often competes in bidding processes—that is, he submits proposals for bridge projects trying to convince companies that they should hire him to actually build the bridges. I wonder if Dad uses quad charts.

I glance at the clock and see I've still got more than an hour of "rec time" to blow, so I decide to create a quad chart cheat sheet to help me figure out how these things work. Maybe I can help Dad do one sometime and generate a little freelance work.

So here's my cheat sheet:

Quad Chart Cheat Sheet	
This section should contain some sort of image of the proposed concept. Maybe in engineer-world, it's the token "pretty" section.	This is the marketing part. It details the capabilities of the proposal. What's new and better about it?
I call this the "technology quadrant." It should include the technical aspects of the project, divided into logical phases.	I think of this as the "hard facts" section. It contains the project cost, schedule, deliverables, and contact information for the developer.

Okay, I think. This isn't so hard. What else does Google have to offer? I stumble across a database of quad chart samples at www.engumd.edu/nsf and am about to get sucked into perusing them when I start hearing my

past English teachers’ voices in my head. Even though I’m getting lots of good information from Google, maybe I ought to be looking for some sort of scholarly article that I could cite if I ever use this in actual work for school.

Google is all well and good for finding examples and simple explanations of what a quad chart is, but if I’m going to use this for real, I should be learning about the quad chart as a *genre*. If this information is ever going to be something I can talk about and not sound like an idiot, I need to know more than rules and conventions. I need to know what scholars are saying about quad charts and why people think the genre is useful. It would be really embarrassing to start talking about quad charts in front of someone important and have them respond with something like, “Well, that article in the latest issue of *Technical Communication Quarterly* said that quad charts are *so* 2005.”

I’m too full of doughnut for a long walk, so I decide to see what’s available through the library’s online databases. That search turns up an article called “Quad charts in software project management” by John Stamey and Thomas Honeycutt. It’s only six pages, but it offers at least three variations on the definitions I’ve put in the quadrants on my practice chart. As I read, I realize that quad charts can be used in a bunch of different ways, and my goal for the chart will be the driving factor in how I decide which variation to use.

For example, Stamey and Honeycutt are writing about software engineers. One of the charts they offer is as simple as the one shown at right. Because we’re talking about software here, a graphic isn’t required. So, they use the top-left quadrant for **DO**ing: testing the idea on a small scale. Instead of marketing—because this chart is used early in development rather than as a formal proposal—they **PLAN** how to improve operations. And the other two quadrants are basically the same as what I’ve already learned, although these people are definitely adjusting based on context.

DO	PLAN
CHECK	ACT

All right, so I know there are a lot of different ways quad charts can be used, and the content of the quadrants will change along with those uses. But are there any *main* uses that I should know? How will I ever figure that out? I give up for a while and check Facebook. Then my email. And, lo and behold, there are a whole bunch of responses to Northcut’s original question.

The first response that catches my eye is from Associate Professor Katherine Wikoff, who suggests that Northcut was actually looking for an A3 report. Wikoff says the A3 report is famously used by Toyota.

So I follow the thread of emails and do a little more searching, this time on A3 reports. I discover that “A3” refers to the size of paper used, which is 11 x 17. So maybe it’s like a quad chart on steroids.

It turns out that quad charts and A3 reports are two distinct genres. For one thing, quad charts do not have to be done on 11x17 paper, and A3 reports are limited to that format. A3 reports always offer a solution to a problem while quad charts can do other things. But Wikoff said in her email that A3 reports are used often in engineering because of their visual orientation and ability to capture information for brief reports, and those concepts also apply to quad charts.

So, going back to Google. I find that while A3 reports and quad charts can be rhetorically similar, they're different in terms of formatting and delivery. Which means it's just as likely that my dad would use an A3 report in civil engineering rather than a quad chart, right? Now, I've got to figure this out.

Before long, I discover a clever site that explains A3 reports and gives samples at www.coe.montana.edu/IE/faculty/sobek/A3/. This site says there are six parts to the A3 report. The first part details research on the situation and the second part is a cause analysis. The third part offers solutions to the cause, and the fourth part describes an ideal solution. Finally, in part five, the author writes out the plan. And the last part offers predictions and any follow-up procedures.

Easy enough.

Except it's not.

I let my inner nerd out and attempt to make both a quad chart and an A3 report for fun. It takes forever. I just keep coming back and trying to cram in more information, but one page—even an A3-sized page—just isn't enough room to summarize a decently detailed proposal. I was playing with adding more parking on campus as a topic, but there simply isn't enough room to cover everything I want to cover in terms of pros and cons, new parking areas, and monetary changes. I realize, belatedly, that this would be even more frustrating if I had already written a report and now the contents of that report wouldn't fit in my summary document.

Then—after the fact—I read Professor Michael Albers' response to Northcut's email: "I encountered quad charts this summer while working in a Navy research lab. The person creating it was complaining how hard they are to create. He could produce a 6 slide PowerPoint with the same information in 30 minutes, but spent [a] couple of days tweaking the quad chart to get everything it had to contain [...] in readable form." Albers also says the same person liked quad charts...when he was the one receiving them instead of creating them.

It turns out that quad charts and A3 reports are just like everything else in technical communication, or in composition in general. The focus is on the user—as it should be.

Wow, I think. How much time could this save people who have to read tons of stuff for their jobs? If the people who wanted something from them had to do the work to summarize and make one of these charts, it might really streamline things. Not only would there be less work for the people getting the reports, but the people submitting them would get faster responses. If I teach my technical writing students about these two genres, I might be really giving them a step up in the workplace. I'm feeling less and less guilty about not going to the rec today, and then I read more of the replies to Northcut's email and discover that quad charts and A3 reports are often used in organizational administration, vehicle design, and government grant application.

That seals the deal. This really was time well spent learning two new genres.

To share my new understanding of quad charts and A3 reports, I ask my technical writing class in Spring 2010 to examine the genres and produce one or the other on a topic of their choice.

The following is one of the excellent quad charts produced in that class.

I guess it serves me right.

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Get Fit: A Plan For Weight Loss and Fitness

by Katie Fagan

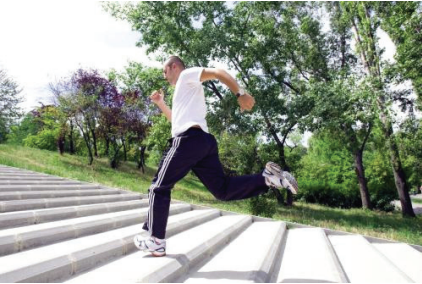

  <p>Keep your eyes on the prize!</p>	<p><u>Technology</u></p> <ul style="list-style-type: none"> • Pedometers measure footsteps. A person should walk 10,000 steps in a day to burn calories. • Heart rate monitors show heart rates, which should be between 70-80 beats/minute when resting. • Weight Watchers sliding scales show people how many "points" they've eaten in a day. Less points = better! • BMI Scale measures body mass index, which shows how much fat a person has, which should be under 24.9. <p><u>So What?</u></p> <ul style="list-style-type: none"> • The more a person weighs, the higher risk they have for developing illnesses/diseases. • Using tools like pedometers, heart rate monitors, and eating tools will help monitor fitness. • Weight loss is publicized by TV shows, such as "The Biggest Loser."
<p><u>Participants</u></p> <ul style="list-style-type: none"> • ANYONE can lose weight if they put their mind to it and have goals for each week such as losing 1 pound & eating healthier foods. <p><u>Schedule</u></p> <ul style="list-style-type: none"> • Exercise in the morning. • Stretch arms, legs, back, etc before doing any cardio activity. • Do a form of cardio (walking at fast pace, jogging, running, jump rope, elliptical) for 30 minutes 3 times a week. If more weight is wanted to be lost, increase the length and intensity of exercise. • Eat breakfast with protein. 	<p><u>Funding</u></p> <ul style="list-style-type: none"> • Membership at LA Fitness (monthly, after sign up fees): \$34 • Cost of average treadmill: \$1,000 • Exercise balls: \$20 • Exercise Floor Mat: \$40 • Exercise Videos: around \$20 <p><u>Benefits</u></p> <ul style="list-style-type: none"> • It is obvious that being healthy and fit comes at a financial cost, but it is less expensive to prevent excess weight and health problems than to have to fix the problems through prescription medicines and doctor visits. • Many fit people feel that they have a better quality of life, because that they can participate in more physical activities and they look and feel better.

Figure 2: Quad Chart Prepared by Katie Fagan for a Technical Writing Course



Erin Frost is a PhD student in English Studies at Illinois State. She teaches rhetoric, technical writing, and women's and gender studies courses. Aside from finding creative ways to avoid breaking a sweat, she enjoys knitting, traveling, and having *The Office* marathons (complete with junk food) with her husband.

