Spanish business writing genre research: electronic mail memoranda

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Spanish business writing genre research: electronic mail memoranda

by

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ABSTRACT

Despite the prevalence of a belief in the importance of preparing students for work in a global economy, very little research into Spanish-language written communication practices exists in US foreign language and business writing journals. In this study, I formed issues statements regarding Mexican business e-mails based on congruencies in the findings of previous Spanish-language writing research and US-English e-mail writing research and then tested these issues against a corpus of 107 Mexican business e-mails. I employed both a qualitative rhetorical analysis and a quantitative feature presence/absence analysis. Of the eight issues statements describing Mexican business e-mails, only two were affirmed. The issues statements describing these workplace e-mail messages and the findings of this study are; 1) they are organized in a non-linear fashion—disaffirmed, 2) they are highly specific with a high level of detail—disaffirmed, 3) they are indirect in approaching the main topic—disaffirmed, 4) they contain “ornate and flowery” language—disaffirmed, 5) they address personal issues before work-related issues—disaffirmed, 6) they do not contain salutations—disaffirmed, 7) they do not contain signatures—affirmed and, 8) they are not written in all upper case letters—affirmed. The findings suggest a need for genre-specific research to take the place of existing research on under-defined documents and other existing research that has perhaps been over-generalized.
CHAPTER ONE

SPANISH BUSINESS WRITING GENRE RESEARCH:

BACKGROUND AND CONTEXT

Introduction

As an undergraduate foreign language major (many years ago), I always lamented the fact that the only courses available in my field were literature centered. I had hopes of using Spanish (my second language) in professional contexts such as translating or conducting business with native Spanish speakers. The literature courses I took were interesting and contributed tremendously to my liberal arts education, but it seemed to me that the vocabulary from those texts would only go so far in communicating in the business world, and the literary periods studied at that time were not conducive to gaining an awareness of contemporary cultures. A person wishing to use Spanish in vocational or applied contexts was advised to study abroad.

Studying abroad is clearly one of the premier methods of learning to speak a second language. However, unless one participates in an internship or related program, one does not have access to job-specific language training including discipline-specific writing instruction. Context-specific writing instruction in the Spanish curriculum is limited even in countries where Spanish is the official language, except in very limited situations (Tebeaux; Thatcher; Martin; Maurial).

In graduate school I again hoped to study Spanish from perspectives other than literary. By this time (approximately twenty-five years later), the foreign language discipline had broadened in the US. My university offered a track in linguistics in addition to literary
studies. At this same time in English as a Second Language (ESL) I was introduced to the idea of teaching genres in second language composition and writing classes. This fact reinforced my belief that teaching writing genres in foreign language classes was a worthwhile endeavor.

Neither learners of Spanish as a second language nor learners of Spanish as their first language have available to them well-researched, genre specific materials for instruction in writing (Tebeaux), a deficiency that this research project aims to explore and for which I hope to offer direction for the future.

After entering the Rhetoric and Professional Communication doctoral program at Iowa State University, I became interested in contrastive rhetoric which is the study of the differences in writing practices between languages, in part because of my interest in professional language study in Spanish. Contrastive rhetoric (CR) has two main currents in the US, work done by researchers in the ESL field and work done by researchers in New Rhetoric\(^1\) (Flowerdew; Hyon; Swales). Contrastive rhetoric research in the field of ESL studies languages other than English in order to identify the language areas that will cause problems for learners of English as a result of negative transfer from the foreign language (Kaplan; Flowerdew). For example, it was proposed that English-speaking learners of Spanish would have difficulty with the concept of nouns having gender in Spanish because English nouns do not have gender (Larsen-Freeman and Long, 54). Contrastive rhetoric research in New Rhetoric focuses on the sociocultural aspects of genre and investigates composition and professional writing in a native language context (Flowerdew, 3). While the

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\(^1\) New Rhetoric is the term often used to describe Composition Studies today because of the current emphasis on the rhetorical situation in today’s instruction.
purpose of genre studies often varies for ESL and New Rhetoric researchers, there is overlap
in the object of study, the findings and some methodological procedures (Flowerdew, 4). The
notion of genre and some of the concept's historical development are useful for my
exploration of business writing in Spanish. In this introductory chapter I will discuss the
development of "genre" studies as a field and identify some of the theoretical issues relevant
to this study of professional writing in Spanish.

My research seeks to answer the specific question, "What are the rhetorical
characteristics of e-mail messages written in a Mexican workplace?"

There are two classes of students who may benefit from the knowledge gained in this
research: students studying business or technical communication in English, and students
studying Spanish as a foreign language who aspire to use Spanish in their professional lives.
As discussed in detail in this chapter, textbooks for business or technical writing in US
universities and colleges typically advise students to consider cultural differences when
preparing documents for native speakers of languages other than English. However, they do
not usually provide concrete instructions for meeting the needs and preferences of these
audiences (e.g., Anderson 2003; Ewald and Burnett 1997; Burnett 2005; Lannon 2003), but
instead offer descriptions of cultural traits or generalizations concerning writing practices.
Of course, it would be nearly impossible for these texts to include specific cultural
preferences and the means for satisfying them due to space constraints; but ancillary texts
could be developed to cover major economic centers' rhetorical preferences much like
Scollon's work (Scollon) focuses on Asian economic centers.

One of the leading researchers and experts on contrastive rhetoric, Ulla Connor, cites
a lack of familiarity with other languages' preferred writing styles as "the main cause of non-
native writers' relative lack of success in the international community" (Connor 1996 cited in Martín 2003, 26). Upton and Connor (2001) in explaining "[t]hat genre expectation varies not only from genre to genre, but also from culture to culture," suggest that "negotiating cultural differences in genres" ought to be "an expected part of writing for writers from one culture seeking to communicate with members of another culture" (314). So, whether the students referred to as possibly benefiting from the findings in this research anticipate writing in English for native Spanish-speaking readers, or writing in Spanish (as their second or foreign language) for Spanish-speaking readers, they need more than general writing instruction. As Montaño-Harmon states, "[s]ince the logical development of texts is not universal but language/culture specific, it is imperative that language teachers be aware of differences in discourse features and teach these to students developing literacy skills in a second language (Montaño-Harmon, 425).

Before entering into the theoretical issues relevant to this study, it is appropriate to address my apparent centering of writing skills in foreign language education. As a student of rhetoric and professional communication, I naturally place great value on effective writing. Obviously, learners' needs vary depending on the contexts in which they expect to use their second language skills. Some learners may use oral skills nearly exclusively and others may rely much more on their written abilities. My goal is to develop insights that will favor development of writing instruction for those programs with a focus on non-academic writing skills.

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2 The two audience purpose can be confusing. For this reason, I have constructed a simple table on page 9 that may help clarify this issue.
Theoretical Issues

The idea that a culture's written rhetorical preferences can be taught in higher education rests on a number of assumptions. In this section I discuss issues related to these assumptions. I begin with the concept of culture, and then discuss ethnocentric terminology and practices.

Culture and Authority

Defining culture has proven problematic repeatedly in research and other contexts, and involves the classic struggle surrounding scientism and constructivism in the field of rhetoric and professional communication. In my research, the term culture is used rather loosely to refer to the shared understanding and way of doing things of the employees of one organization in a particular Mexican location at a particular time. The materials examined in this research were collected from a five star Mexican resort during the summer of 2004. I served an internship at this resort in Nuevo Vallarta, Nayarit adapting written guest materials for US and Canadian English speakers. The materials had been translated into English by native Spanish speakers but followed the writing conventions and expectations of Mexican guests. While serving in this capacity, I collected samples of business communications from my co-workers. The specific culture I discuss then is that of this place of business with these employees at this time. The culture is based on Mexican world-views overlaid with the culture of this specific work environment.

3 I am a middle-aged white female born and raised in the Midwest having extensive academic and living experience in Spanish and Spanish speaking countries.
Ethnocentric Terminology and Practices

Investigating a language other than one's first necessarily involves two languages: the investigator's first language, often referred to as the L1 and the language being compared to that L1, the Target Language (TL) or L2. Some researchers prefer the use of NL for native language to L1 and SL for second language to L2. Regardless of the preference of the authors of these studies, it is almost always assumed that the SL, L2 or TL is English perhaps because of contrastive rhetoric's roots and influence. Contrastive rhetoric was born out of a desire to improve the teaching methods of English as a Second Language—not German as a second language or Spanish as a second language.

However, not all interest in contrastive rhetoric relates to teaching English to learners from LOTE (language other than English) backgrounds. This study, for example, investigates professional writing in Spanish. Throughout this study I will employ designators to identify the native and target or second languages of subjects, whichever is relevant to the topic at hand, by using the abbreviations EngL1 (English first language) or EngTL (English target language) and SpanL1 (Spanish first language) or SpanTL (Spanish target language).

According to Melinda Reichelt (Reichelt 1999), Reppen and Grabe (Reppen) and others, including studies of target languages other than English is crucial in developing a general theory of writing. Even though my goal is not specifically to contribute to a general theory of writing, Reichelt's ideas on the inappropriateness of focusing only on English in writing studies is appropriate to my research. She quotes Silva as saying we could do much to enhance and legitimize current mainstream (L1 based) theories of writing by making them less narrow: less monolingual, less monocultural, less ethnocentric, less fixated on writing by eighteen-year-old native speakers of English in North American colleges and
universities and more inclusive, more realistic, more generalizable, and ultimately, more valid (Silva). (182)

Reichelt found that only three out of eighty-one articles appearing in the Journal of Second Language Writing between 1992 and 1999 dealt with a target language other than English even though it openly invites articles on research about LOTE target language writing. Studies of writing in non-English target languages exist but they more often appear in "foreign language" sources (e.g., Foreign Language Annals, Hispania, Modern Language Journal) than in writing sources such as The Journal of Business and Technical Communication, and College Composition and Communication, or TESOL Quarterly and The Journal of Second Language Writing.

One commonly finds that studies reporting on language learning include subjects who are learners of both English as a Second Language and learners of some other language all of whom live in the US. The convention is to call the first group ESL learners and the second Foreign Language (FL) learners. Of course, the first group consists of people learning English in the US and the second consists of people learning a language other than English in the US, i.e., not surrounded by the language of study. I contend that there is more difference than simply the target language between these two groups of language learners even though research from the former has heavily influenced the latter (Krashen). I would prefer that the two groups be treated separately because their learning contexts are so vastly different. For example, the learning context for one learner's spending one hour, even daily, in the FL classroom cannot and does not compare to that of an ESL learner living where the TL is the "official" language of the surrounding environment. But a discussion of whether it is appropriate to apply the findings from one group to the other is beyond this investigation. I
mention the mixing of learner types in much of the existing research here because much of
the research relied on for the present study contains what I believe may be a flaw that has
been ignored until now.

**The Purpose of My Research**

In this section I describe who will benefit from this research and how. After
describing the beneficiaries, I discuss the reasons for studying Mexican Spanish business
genres and then I discuss how the study may be used to improve both Spanish as a foreign
language curriculum in the US and English business writing curriculum in the US.

People who may benefit from knowing the rhetorical characteristics of e-mail
messages written in a Mexican workplace include students of business communication in the
US, students of Spanish in the US, their future employers, and researchers and practitioners
in composition (e.g., technical communication and business communication) and English for
Specific Purposes (ESP). I consider the students to be the primary beneficiaries.

In studying and learning more effective intercultural communication techniques, these
students may be better prepared to more successfully complete their responsibilities with
their employers, benefiting themselves and their companies. And, providing some of the
material necessary for intercultural writing pedagogy should help composition teachers and
Spanish as a foreign language teachers to address specific concerns for students preparing to
write for specific intercultural audiences, purposes and contexts. Also, ESP practitioners and
researchers, as well as others interested in writing, continue to amass research findings in
order to arrive at a general theory of writing (Reichelt 1999, 181). My research may
contribute to that growing body of knowledge.
Because the primary beneficiaries of this study differ (native English speakers writing in English or writing in Spanish), that can lead to some confusion. I represent the authors and intended audiences of the communications affected by this study in Table 1.1 below.

The discussion surrounding the need for this research is organized around these two written communication situations.

<table>
<thead>
<tr>
<th>Author's native language</th>
<th>Communication written in</th>
<th>Audience's native language</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. English</td>
<td>English</td>
<td>Spanish</td>
</tr>
<tr>
<td>2. English</td>
<td>Spanish</td>
<td>Spanish</td>
</tr>
</tbody>
</table>

Primary authors and audiences who may benefit from this research

In the remainder of this section I address the appropriateness and need for research on Mexico's professional written communication preferences and then discuss the collateral need for augmenting the content of US business writing courses in Spanish as a foreign language.

Studying Written Rhetorical Preferences of Spanish Can Improve US Written Business Communication Curricula

I propose two reasons why studying Mexican professional communications can benefit US written business communication students; 1) to fill the gap in the information provided US business communication students concerning the written rhetorical preferences of other cultures (situation one in Table 1.1), and 2) to improve the writing curriculum for Spanish foreign language students who wish to use their foreign language skills in a business setting.

The idea that writing practices may vary by culture was first explored by Robert Kaplan in "Cultural thought patterns in inter-cultural education" (1966) and has since
evolved into the discipline known as contrastive rhetoric (CR)⁴. Kaplan taught college-level English as a Second Language in California where, through years of practice in the classroom, he concluded that the "foreignness" of organizational practices in ESL student writing seemed to be similar for writers from the same native language and cultural background. That is, he believed that writers from similar cultures organized their writing in the same general way, and that these ways of organizing information in writing were different from what was deemed "good" organization in composition writing in the US. In order to help ESL students modify their writing practices to better meet the demands of their US audiences, Kaplan studied over 600 examples of ESL student compositions and published his famous article in *Language Learning*. Kaplan believed that understanding the influences of enculturation on one's writing would help ESL students recognize their "automatic" ways of organizing information and allow them to adopt other practices (14). From the very beginning, then, CR recognized that writing practices acquired in a language learner's first language transfer to his or her practices in subsequent languages.

To date, contrastive rhetoric has focused mainly on *English* compared to languages on the Pacific Rim of Asia (Reichelt 1999, 181; Tebeaux, 49). That is, the bulk of contrastive rhetoric studies investigate the features of (mostly US) English writing in order to teach these practices to speakers of other languages who study (any discipline) in the US or who study English in the US or at home (Connor; Swales; Bhatia; Grabe). Probably also because of its roots in ESL, ESL contrastive rhetoricians do not address the fact that it may

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⁴ I adopt a traditional definition of culture, one that defines culture as "geographically and/or nationally distinct entities" Thomas; Ulla Connor Upton, "Using Computerized Corpus Analysis to Investigate the Textlinguistic Discourse Moves of a Genre," *English for Specific Purposes* 20 (2001) for the same reasons that Upton used this definition. My samples come from a small and specific cross-section of a culture so the broader ramifications of the term *culture* do not apply. However, I did discuss the ramifications of the meaning of *culture* in the Theoretical Issues section of this chapter on page 4.
be beneficial to US students to learn how to adapt their English writing to better meet the demands of their audiences, regardless of those audiences' languages or cultural backgrounds. The focus in the United States on languages on the Pacific Rim of Asia and on learners of English and not other languages means that little research exists dealing with other languages and learners. However, recently, ESL contrastive rhetoricians have begun to publish studies of their own languages in US journals in order to compare them to English (e.g., Martin; Moreno). This signals a shift in the expert/researcher's language of expertise leading to variety in the languages of study available in US journals.

New rhetoricians involved in CR also focus primarily on the generic preferences of US English writing. Addressing this lack of attention to other cultures' generic preferences is one of the purposes of this research: it may be used by teachers of business communications to enlighten their students about one specific culture's written rhetorical preferences.

Business communication and technical writing textbooks in the US regularly include general information about differences in cultures' preferred communication styles as mentioned above on page 3 (Anderson, Lannon, Burnett, Ewald & Burnett). It is not enough information, however, for a student to modify her writing for a particular culture. A typical business communication textbook suggestion for improving inter-cultural communication might be to avoid adopting all stylistic and formatting recommendations in the text without first investigating their appropriateness for the intended audience. For example, in Technical Communication (Lannon) the author gives the following recommendations.

The style guidelines in this chapter apply specifically to Standard English in North America. But practices and preferences differ widely in various cultural contexts.
Certain cultures might prefer long sentences and technical language [sic], to convey an idea's full complexity. Other cultures value expressions of respect, politeness, praise, and gratitude more than clarity or directness (Hein 125-26; Mackin 349-50). (283)

Where can business communication students in English turn to get information regarding the written communication preferences of their audiences? What guidance can they find to help them write in a culturally sensitive way? Currently, students must go to primary resource information such as writing stylebooks from the target language or culture (written in those countries' languages), or, they must seek out primary research and journal articles on the topic.

My research may help these students by allowing textbook authors to describe specific writing preferences for one specific situation of intercultural communication—business e-mail messages to be read by Mexican Spanish speakers. I describe below the reasoning for studying Mexican business communication as opposed to, say, Chilean business communication.

The teaching of non-academic writing at the college or university level is not a global phenomenon: colleges and universities in other countries, and most relevantly Mexico, do not offer courses in business writing (Tebeaux, 71; Maurial, 142). This means that we cannot simply study those countries' writing textbooks to ascertain the preferred styles, formats, approved organization and tone for business communications. Native speakers presumably acquire these skills on the job.

In terms of Table 1.1, the discussion so far addresses the situation in the first row of the table—native English-speaking author writing in English for an audience reading English but whose first language is Spanish. One answer to a critical question, "Why study written
rhetorical preferences of Spanish?" then, is to help business communication students draft
documents organized and designed to meet their native Spanish-speaking readers'
expectations even though the documents are in English. Before moving on to another answer
to this question, it is appropriate to explain why this study investigates the genre preferences
of Mexico instead of another Spanish speaking country.

Mexico is the focus of this study because it is a country with which many US college
students may reasonably expect to have professional contact, partly because of proximity and
partly because Mexico is the largest trade partner the US has with a Spanish speaking
country. In fact, for at least the last five years, Mexico has been the second largest US trade
partner, trailing only Canada in total dollars worth of trade; for 2003 (latest data available),
the total value of imports and exports between Mexico and the US was $235,530,000,000
(Bureau).

Now we move on to the situation described in row two of Figure 1.1, native English-
speaking author writing in Spanish for a native Spanish-speaking audience.

**Studying Written Rhetorical Preferences of Spanish Can Improve the Writing Curriculum for Spanish Foreign Language Students in the US**

To understand how my research may serve to improve the Spanish writing
curriculum, we need to examine the current state of foreign language (FL) writing instruction
and research in the US. It is necessary to differentiate between the two practices because the
bulk of the research published in US journals on second language composition appears in the
area of ESL: there is a limited amount of research published in the US on writing in a foreign
language.

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5 In the US, "foreign language" is any language other than English and is often referred to as LOTE.
While the concept of learning to write in a second language applies to students' experiences in both ESL and FL in the US, Reichelt (2001) points to the distinctions between the two and the effect these differences have on the issues debated by their practitioners. When ESL specialists debate the appropriate goal for writing instruction, they list goals ranging from highly specific genre based instruction (Horowitz) to instruction in general rhetorical principles (Spack).

Table 1.2 describes four contexts of learning ESL compared to learning an FL with both referred to as the target language or TL (Reichelt 2001, 578).

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>ESL</th>
<th>FL</th>
</tr>
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<tbody>
<tr>
<td>1. Learners write for classes in addition to the language class in the TL.</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>2. Learners live in a community where the TL is the language of the community.</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>3. Teachers are typically native speakers of the TL. *</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>4. TL serves role of &quot;a world language&quot; including higher ed. and science. **</td>
<td>yes</td>
<td>no</td>
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</table>

ESL compared to FL learning in the U.S.
* This was true for the reporters of the research Reichelt investigated in her 2001 article.
** Whether this negatively affects this research was discussed in the Theoretical Issues section on page four.

It is beyond the scope of this work to investigate the effects these differences should have on second language instruction. However, it does seem reasonable to expect that at least the second listed context would have some impact on differentiating preferred methods for instruction in the two language situations (ESL vs. FL).

An organized, purposeful debate of the goal of writing instruction does not exist in the FL writing research (Reichelt, 2001, 579; Valdés, 333). Perhaps more important than this lack of discussion is the apparent confusion within FL pedagogy circles concerning the profession's current stance on writing instruction of any kind.

The American Council on the Teaching of Foreign Languages (ACTFL) published its Proficiency Guidelines in 1987. The Guidelines were not intended as developmental stage
descriptions but rather as an expression of the competencies those in the profession could reasonably expect of learners at different levels of development (Valdés, 334). The Guidelines include competencies for each language skill (oral, aural, reading and writing) at various levels of development (novice, intermediate, advanced and superior.) It is not unusual to find language similar to the Guidelines' in FL course syllabi as expected learning outcomes attesting to their strong influence on FL pedagogy in the US. However, the ACTFL competency guidelines do not appear to consider writing wholly within the current understanding of learning to write in a second language. For discussion purposes, a summary of the Guidelines follows on page 16 (Omaggio, 111).

Valdés, Haro and Echevarriarza investigated the Guidelines for the purpose of augmenting a general theory of second language writing (1992). They found many incongruencies and questionable assumptions underlying them. For example, comparing organizational ability which the Guidelines claim to be established at the intermediate-high level, to the mechanical, physical writing ability of the novice suggests that, "even though students copy, recombine, and compose at an earlier level, they will have varying notions about organizational development and an inconsistent ability to write in paragraphs until they reach the intermediate-high level" (338). That is, Valdés, Haro and Echevarriarza point out that the Guidelines suggest that the ability to organize writing in a foreign language will not occur until the intermediate-high level of competency even though students at the novice level can copy, recombine and compose paragraphs. These types of incongruencies are symptomatic of the general lack of focus in FL concerning writing. Writing does not need to be central to an FL education, but I believe writing is at least as important as reading in the context of conducting business in an FL.
<table>
<thead>
<tr>
<th>Superior</th>
<th>Function</th>
<th>Content</th>
<th>Accuracy</th>
</tr>
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<tbody>
<tr>
<td>Superior</td>
<td>Able to use written language effectively in formal and informal exchanges; writes most types of correspondence, short research papers, statements of position, expresses hypotheses and conjectures, and supports points of view; uses a dictionary to supply specialized vocabulary</td>
<td>Practical, social and professional topics, common topics and specialized fields of interests.</td>
<td>Good control of full range of structures, spelling; wide vocabulary; can use complex and compound sentences; clear coherent paragraphs with high degree of accuracy using a dictionary; no patterns of errors, rarely disturbs NS, although <strong>style may be foreign</strong>; may not tailor writing precisely and accurately to a variety of audiences or styles.</td>
</tr>
<tr>
<td>Advanced</td>
<td>Able to write routine social and informal correspondence, discourse of several paragraphs, cohesive summaries, resumes in some detail; takes notes; describes, narrates and explains points of view simply; some ability to circumlocute; able to use a dictionary.</td>
<td>Familiar and everyday topics; current events, factual and concrete topics relating to particular interests.</td>
<td><strong>Style obviously foreign</strong>, yet understandable to NS not used to nonnative writing; joins sentences in limited discourse; paragraphs reasonably unified and coherent; sufficient vocab for self expression with good control of basic morphology and elementary constructions, yet may have weaknesses in vocab and grammar; errors still common in spelling, punctuation, complex sentences; under time constraints or pressure may be inaccurate or incomprehensible.</td>
</tr>
<tr>
<td>Novice</td>
<td>Can create statements or questions enough to meet practical needs and some limited social demands; write short messages, paragraphs, letters, short compositions, takes notes, can express present time well, some future time, and rudimentary past time; uses a dictionary in simple fashion.</td>
<td>Familiar and personal topics including preferences, daily routine, everyday events, time expressions, school/work experiences, food, lodging, transportation.</td>
<td>Comprehensible to NS used to dealing with NNS; evidence of good control of basic constructions &amp; inflections, although occasional errors; fairly accurate in present and future time; frequent errors when venturing beyond linguistic competence; unable to identify appropriate vocab in dictionary or to use vocab in inflected form; generally cannot use basic cohesive elements of discourse.</td>
</tr>
<tr>
<td>Novice</td>
<td>Can copy and transcribe, supply information, make lists.</td>
<td>Isolated words and memorized material including names, numbers, dates, nationality, addresses, biographical information, symbols and characters.</td>
<td>Frequent misspellings and many inaccuracies.</td>
</tr>
</tbody>
</table>

**A Summary of the ACTFL Writing Competencies**
The contexts listed in Table 1.2 on page 14 may help explain the very different emphases found in the research in writing in the target languages of either ESL or a foreign language.

Perhaps because ESL has an immediate use for its learners due to the environment (both the learning environment and the global environment), specialists are faced with practical application questions like the appropriate goals for writing instruction mentioned above. For FL, on the other hand, how or when a student of the FL may use the language is not as clearly known with the exception of immediate FL classroom applications. So, compared to ESL, FL professionals may "not currently agree on what role the FL will play for students outside of the FL classroom" (Reichelt 2001, 579). Traditionally, FL, like English Studies before it, had literature at its center. The revolution that brought about teaching specific writing genres in the English department has apparently not yet affected the FL department (Valdés, 334).

**Current Practices in Spanish Curricula**

For purposes of demonstrating current practices in Spanish curricula, I next describe typical course offerings in institutions of higher learning in the US. But, instead of looking at what the vast majority of colleges and universities offer in the Spanish classroom, I focus on those institutions that have made a public statement about their interest in the business future of their foreign language students. I selected these institutions based on their designations as Centers for International Business Education and Research (CIBER). The federal government established the CIBERs in 1988 through passage of the Omnibus Trade and Competitiveness Act (CIBER). According to the government's web site, the CIBERs' purpose is "to strengthen the capability and performance of American education in foreign
"languages and in area and international studies" (U.S. Department of Education).

Investigating this group of schools should single out institutions likely to offer business communication type courses in their FL instruction—the type of instruction I propose needs to be extended to or adopted by the majority of colleges as opposed to or in addition to literature and composition focused on literature.

These thirty centers of higher education (for the 2002-2006 grant cycle) may be the most aware of the importance of international communication and, hopefully, provide the ultimate in foreign language curricula for business purposes. Arguably, they should offer foreign language courses that will best prepare graduates to communicate in the international business arena. Since CIBER is a program to support international business, business is the focus of many of the institutions, so I will only discuss those colleges that specifically point to foreign language as one of their areas of expertise limiting the group to four colleges for purposes of this discussion. My delimiting is based on the organizations' descriptions of their Leading Edge Projects for the 2003-2004 fiscal year (CIBER). In this report, the CIBERs describe their institution's focus for carrying out their missions of education and outreach, and from these descriptions I identified those institutions that are focusing on foreign language. I investigated the foreign language curricula and institutes or other special programs found at the following CIBERs.

- Brigham Young University (Utah) collects, hosts and publishes a business language library on the Internet that covers ten international business languages (B. Y. University).

- San Diego State University (CA) offers international degrees and is the home of the only US developed competency certification in business Spanish, EXIGE.

- Thunderbird, The American Graduate School of International Management (AZ), produces a set of instructional CDs titled, "Doing Business in Latin America."
• The University of Pennsylvania offers summer institutes for earning certificates in teaching languages for business.

Even though these four colleges profess dedication to FL in the realm of business, one of them does not offer even a basic Spanish (or any other FL) writing course. In Table 1.4 below I organize pertinent information concerning the teaching of business writing in FL found through investigating the web sites of these institutions.

Of the four CIBERS especially interested in FL, only three offer courses in business Spanish of any kind. Of these three, only one, San Diego State University—one of the leaders in Foreign Language business education—offers a course in writing for business Spanish; the course offerings of the other two focus on vocabulary and social science topics (U Penn) or are courses about business in Latin America and are taught in English (Thunderbird).

If FL study is important, in part, because of the global economy, and it is, then shouldn't students have the option to learn to communicate in FLs for purposes of commerce at least at those schools with the expressed goal of preparing students for international business? In addition to familiarity with great literary works, wouldn't a learner also benefit by receiving instruction in practical business communication applications of the FL? It seems logical to draw this parallel between course offerings in the English department and the Foreign Language department since both prepare students to use the language of study in their future careers.

The ACTFL Guidelines discussed earlier assume learners have cultural knowledge that must be taught (conventions for giving dates, for example) and they assume that
Table 1.4

<table>
<thead>
<tr>
<th>Issue</th>
<th>Brigham Young</th>
<th>San Diego SU</th>
<th>Thunderbird</th>
<th>U Penn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business FL course offered?</td>
<td>Yes, in Marriott School of Management</td>
<td>Yes, 307&lt;sup&gt;a&lt;/sup&gt; and 497&lt;sup&gt;b&lt;/sup&gt;</td>
<td>Yes, but oral proficiency score of advanced low waives all but 3 hours of FL functional topic courses taught in English.</td>
<td>Yes, 208&lt;sup&gt;c&lt;/sup&gt;</td>
</tr>
<tr>
<td>Bus. FL description</td>
<td></td>
<td>307—terminology and forms 497—terminology, techniques &amp; writing business materials</td>
<td></td>
<td>Technical vocab., geography, demography of Latin, Amer. and Spain</td>
</tr>
<tr>
<td>Programs outside FL dept'</td>
<td>International business e-library, Business Management Certificate includes 3 hours of Bus. Span.</td>
<td>EXIGE&lt;sup&gt;d&lt;/sup&gt;</td>
<td>Adv. Bus. Lang. certification&lt;sup&gt;e&lt;/sup&gt;</td>
<td>Institute for Teaching Business FL&lt;sup&gt;f&lt;/sup&gt; Penn Language Center&lt;sup&gt;g&lt;/sup&gt;</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td>Graduate business school</td>
<td></td>
</tr>
</tbody>
</table>

Issues in foreign language writing instruction at 4 CIBER institutions<sup>6</sup>

<sup>a</sup> 307 Introduction to Commercial Spanish (University Catalog)
<sup>b</sup> 497 Advanced Commercial Spanish (University Catalog)
<sup>c</sup> Business Spanish (Pennsylvania)
<sup>d</sup> International Business Spanish Exam (University Exige)
<sup>e</sup> Transcript includes certification in advanced business language if requirements met (Thunderbird).
<sup>f</sup> Thirty-hour program of study in business communication in language (PennLauderCIBER).
<sup>g</sup> Non-traditional Spanish courses like Business Spanish are offered through the Penn Language Center, not the FL department (Pennsylvania).

Rhetorical preferences are not universal and should be taught in the FL classroom.

According to the Northeast Conference (Omaggio, 118), "how to organize, elaborate, define, argue, compare, contrast, explain, generalize, and use connotation to advantage" are not language-specific skills and "there is no reason why they cannot be taught in second-language courses as well" as in English courses. The Guidelines assume rhetorical proficiency in that they expect students to employ discourse strategies that will meet native

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<sup>6</sup> I confirmed this information by writing to the institutions in mid-August 2005. Representatives from BYU, San Diego U and Thunderbird replied.
speakers' expectations. The Guidelines and the Conference both indicate that cultural knowledge can be taught and that the classroom is an appropriate location for this teaching. Therefore, my research can be helpful in furthering the goal of improving writing instruction in foreign languages.

**Conclusion**

Chapter one has provided information on why I believe my research fills a need. Chapter two goes into some detail on the existing literature concerning the major subjects related to the rhetoric of Mexican business e-mails. Included in chapter two are discussions of genre studies in contrastive rhetoric, genre studies of US English business e-mail, and genre studies of Spanish-language documents. It has been necessary to look at all the research on Spanish-language genres published in US education and communication journals because so little exists; I review academic writing studies and professional writing studies.

In chapter three I describe in detail how I collected my documents for study and how I analyzed them. My analyses include simple count analyses of features included in the documents and analyses of rhetorical moves by the authors.

Chapter four reports and discusses the results of my analyses.

Finally, chapter five contains conclusions that may be drawn from my findings, explains the limitations of my study, and makes suggestions for pedagogy and future research.
CHAPTER TWO
SPANISH LANGUAGE BUSINESS COMMUNICATION IN THE CONTEXT OF GENRE STUDIES

Introduction

In general, very little research exists on non-academic genres of Spanish writing in US journals. To date, my survey of published research in this field had yielded only three authors who have investigated professional private sector writing of Spanish documents (Ortiz; Tebeaux; Thatcher, 1998). I have identified another three researchers who have studied the professional writing of academics in research articles for refereed journals (Martin; Moreno; Simpson). This type of writing, research articles, is sometimes confused with academic writing, but I call it professional writing and go into more detail about the distinction later. Finally, two scholars, Maurial and Eure discuss written business communications in Spanish speaking countries. None of the aforementioned research goes far in formulating an understanding of the rhetorical exigencies placed upon those writing professionally in Spanish. This chapter will attempt to address the rhetoric of Spanish language business communication in the context of genre studies.

This chapter will first discuss the usefulness and applicability of genre studies in contrastive rhetoric. Next, I will discuss Spanish writing genre studies, both those

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This statement was true at the beginning of my research. By the time I finished my work, more and more articles were being published on exactly this issue. The Second Annual Conference on Written Discourse and Intercultural Rhetoric at Purdue University (July 2005) had a minimum of four research presentations on non-academic Spanish writing. IUPUI, Contrastive Rhetoric Conference. Available: http://www.iupui.edu/%7Eicic/crconference2005.htm, June 28, 2005.
specifically related to academic writing, as well as those that are unrelated to academic writing.

It is essential to clarify the use of the term “academic” versus “professional” writing in this dissertation because the distinction is often confused. Some researchers, like Martín and Simpson, consider all writing done by academics—college professors, scholars and researchers—including published research articles, to be “academic” writing. This position conflicts with that of Hyon and Rong, who in a study of writing done by academics in or for the workplace state, "Our study focuses on faculty writing and approaches the academy as a workplace with its own set of 'business' genres" (Hyon, 238). That is, the writing they studied was “professional” writing and not “academic” even though it was academics' writing. In my study, as in Hyon and Rong’s, “academic” writing will refer only to the writing done by students to meet the requirements of an educational institution or instructor; such as term papers, research reports, theses and dissertations. I propose that when academics write as part of their scholarly program (e.g., research), that writing be considered “professional” writing.

Genre studies in contrastive rhetoric

In order to discuss contrastive rhetoric studies of genres, it is appropriate to first define the term genre and the evolution of the concept of genre.

Genre and its Usefulness in Contrastive Rhetoric

Understandings of genre were heavily influenced by Lloyd Bitzer in the late 1960s with his discussion of the connection between recurring discourse situations and the constraints that convention imposes on discursive responses to those specific situations.
Miller later clarified that what recurs is a "type" of situation (Miller). Miller tied genre theory to language and culture through the work of Schutz, whom she quotes as saying, "[. . .] language can be construed as the sedimentation of typical experiential schemata which are typically relevant in a society" (29). For rhetorical situations to be common or shared, they must be created socially because they are at heart interpretations of situations (Schutz and Luckman).

Theorists today analyze genres to unearth “tacit assumptions, goals and purposes and reveal unseen players and unmask others” implicated in discourse (Freedman and Medway 2). According to Bakhtin,

"[W]e are given these speech genres in almost the same way that we are given our native language. [...] We know our native language [...] not from dictionaries and grammars but from concrete utterances that we hear and that we ourselves reproduce in live speech communication with people around us (Bakhtin, 1986, 78)."

The "people around us" that Bakhtin mentions are the people in our spheres of activity (other terms include discourse communities and speech communities) and the utterances we employ are “links in the chain of speech communication ... reflect[ing] the speech process, others’ utterances, and, above all, preceding links in the chain [...] (Bakhtin 1986, 93). Therefore it is possible to study a culture’s history through the development of its responses to recurring situations. And, according to Miller, to truly understand the social or cultural aspects of a people, their genres are an excellent resource. “Studying the typical uses of rhetoric, and the forms that it takes in those uses, tells us less about the art of individual rhetors or the excellence of particular texts than it does about the character of a culture or [sic] an historical period”(emphasis added, 31). In other words, individual genres can be thought of as artifacts of a culture’s view of a certain type of situation.
In *Riding the waves of culture*, Trompenaars describes cultures as being layered constructs (Trompenaars). The layers are the explicit and observable (language, food, etc.), the norms and values of the group (norms are the understanding of right and wrong and values the understanding of good and bad), and the group's assumptions about existence (22). This last component relates to that group's interactions with nature and its means for surviving or adapting in that environment. Culture "provides people with a meaningful context in which to meet, to think about themselves and face the outer world" (24). Through habitual practice, groups construct forms and structures for handling various situations and these structures "are imposed upon the situation" (24) just as genres are responses to situations. Culture is to a group's view of existence as genre is to a group's view of writing in a context.

The centrality of culture to genre is thoughtfully developed by Berkenkotter and Huckin in *Sociocognitive Theory of Genre* beginning on page x of the Preface (Berkenkotter and Huckin). The authors view genre as both process and system that function within cultures to “facilitate the multiple social interactions that are instrumental in the production of knowledge” (1). For Berkenkotter and Huckin, genre knowledge is situated cognition, with genre conventions signaling the norms, epistemology, ideology and social ontology of a discourse community (3). As Miller says, genres are “a rhetorical means for mediating private intentions and social exigence” (Miller, 37). Sonja Foss also points to the social component of response to recurrent situation and the connection between genre and social reality (Foss). She quotes Gronbeck’s explanation of this connection as being “grounded [. . .] upon culturally imposed criteria for thinking” (227). The value of understanding genres in order to achieve insight into cultures at an almost subconscious level is supported by
Bakhtin’s explanation of the near innateness of genre responses; Miller’s description of intentions and social exigence; and Berkenkotter and Huckin’s discussion of a group’s exposition of norms, epistemology, ideology and social ontology through its genres.

Because the concept of genre relies so heavily on the idea of a community or culture, it is important to have a clear understanding of what that community or culture is. Defining culture can be problematic depending on the purpose for which the definition will be employed, as discussed in chapter one. Swales, one of the foremost authorities on genre studies, defines a group as a discourse community (a culture) if the group:

1. has a broadly agreed upon set of common public goals
2. has mechanisms of intercommunication among members
3. uses its participatory mechanism primarily to provide information and feedback
4. possesses one or more genres in the communicative furtherance of its aims
5. has acquired some specific lexis, and
6. has a minimum number of members with content and discourse expertise (Swales, 25-27).

Swales’ view differs from a social constructionist view of community where “[c]oncepts, ideas, theories, the world, reality, and facts are all language constructs generated by knowledge communities and used by them to maintain community coherence” (Bruffee, 777). For Swales, the purpose of the community is not the maintaining of the group but rather some other public goal. The discourse community I studied fits within Swales’ definition and has the public goal of furtherance of their enterprise.

Even though an exact definition of the culture or community under study (as may be necessary per a critical theory approach) may be contingent on the context of each study, we can still make use of generic research in contrastive rhetoric. For example, there are communicative difficulties associated with ignorance of the generic expectations of another language (Kaplan 3; Montaño-Harmon 424; Swales 10; Scollon xiii). Understanding and
applying genre knowledge to intercultural communications should serve to lessen these communicative difficulties. For example, Montaño-Harmon illustrates the difficulties inherent in an English-speaker's ignorance of Spanish-writing-genres:

If English-speaking writers compose texts in Spanish using the deductive, linear discourse pattern of English, at best they will sound simplistic and juvenile, or boring and dry to a native speaker of Spanish. At worst, the writer will project a hidden message of abruptness, even rudeness, insulting his Spanish-speaking reader with a linear, deductive, enumerative composition. (424)

If, as Montaño-Harmon asserts, Spanish rhetorical choices in writing composed by US English speakers appear simplistic, juvenile, boring or dry when read by Spanish speakers, it is not intentional on the part of the writer. All writers write according to the rhetorical practices of their culture and these are displayed through their genre choices. For English-speaking writers to better communicate with, in this instance, practitioners of Spanish business writing, researchers need to scrutinize at least the form and content and, to native speakers, common knowledge construction of this discourse so that writers may study it. In addition to carrying the echoes of others’ utterances and traditions of meanings, utterances also meet readers’ expectations by providing the “speaker’s plan or speech will” (Bakhtin 1986, 77). The intentional dimension of genre, according to Bakhtin, can only be understood by observing “insiders” (Bakhtin 1981, 289). So, to understand a culture’s communication practices, it is helpful to be familiar with that culture’s genre structures. Lack of familiarity with Spanish genres weakens the effectiveness of communications and sends unintentional between the lines or implied meanings even though a communication is written with correct Spanish vocabulary, syntax and grammar. The application of foreign genre choices is at the heart of intercultural miscommunication, not necessarily poor language skills, just as Kaplan asserted in 1966.
Contrastive rhetoric and applied studies of genre have much in common even though they pertain to different disciplines within English. Contrastive rhetoric is a sub-discipline of writing studies (much like composition, rhetoric, professional writing, writing across the curriculum, etc.) and applied genre studies come from English for Special Purposes (ESP).

Applied genre studies originated in the field of ESL for the purpose of helping learners of English (typically college students) to write more closely to the expectations of their audiences; most of the ovarial\(^8\) research fell within academic uses for writing. It is only recently that research in this field has ventured away from academia for source materials. In the following section I highlight some of this foundational research (beginning with the academic) and comment on what this research has meant to the development of applied genre studies.

**Contrastive Academic Genre Studies as Methodological Precedents**

The ovarial modern genre study is Kaplan's 1966 "Cultural thought patterns in intercultural education." The first study to investigate the affect of culture on writing, Kaplan's work was also one of the first to look beyond the sentence level (2). As mentioned in chapter one, Kaplan collected over 600 examples of English expository writing done by college students for whom English was a foreign language. In addition to looking at papers written in English by speakers of LOTEs (languages other than English), Kaplan also had student papers written in the authors' native languages translated into English in order to compare the development of expository writing in both the native and second languages. Kaplan was

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\(^8\) I use the term "ovarial" instead of the term "seminal" throughout this dissertation. I could have used non-sexist language such as "embryonic," but chose to use the female equivalent of the sexist terminology instead. I chose to do this in order to compensate for the exclusion resulting from common use of "seminal" in scholarly writing. Intentionally using the feminine is similar to the current practice of using the feminine singular personal and complimentary pronouns (her, she) instead of both the masculine and feminine pronouns to compensate for the once accepted practice of using only the singular masculine pronoun.
heavily criticized for grouping papers from distinct but related languages (e.g., "oriental" or "romance") and treating them as one. He was also heavily criticized for the symbolism of the graphic representations he drew to explain the logic followed within these language groups in that they privileged English practices as the direct and straightforward organizational type. Nevertheless, his data and scrutiny were essential to the development of contrastive rhetoric.

Kaplan's ability to see beyond the surface (purported) deficiency of a writing sample to an underlying generator of difference was critical in getting applied linguistics to look beyond atomistic views of language studies—a historically important step.

Much as Kaplan's work set the stage for contrastive rhetoric as a field of study, John Swales' *Genre analysis* pioneered attempts to connect English for Special Purposes (applied discourse analysis) with first language writing and composition studies, i.e. English composition, rhetoric, and professional and business communication. Swales' work provides the framework for a number of subsequent genre studies by other researchers (e.g., Martín; Simpson; and Moreno.)

Important in Swales' work are, among other things, his contributions to solidifying and clarifying the concepts of discourse community and genre. Prior to *Genre Analysis*, discourse community and speech community were often treated synonymously (e.g., Hudson 1980; Saville-Troike 1982; Braithwaite 1984; Labov 1966; and Fishman 1971) as though "it is appropriate to identify discourse community with a subset of speech community" (23). Swales distinguishes between speech communities and discourse communities along three parameters—medium of communication, primary purpose of the group, and the means the groups have of acquiring new members (24). Starting from these distinctions, Swales defines
a discourse community as a group with the necessary and sufficient characteristics listed on page 27 [common public goals, mechanisms of intercommunication, participatory functions for information and feedback, use or possession of one or more genres in furtherance of its aims, specific lexis, and minimum level of members with relevant content and discourse expertise] (24-27). For Swales, a genre is "a class of communicative events" with "some shared set of communicative purposes" (45-46).

**Genre studies in English-language e-mail**

Instead of *genre* studies in e-mail research, for example studies of e-mail messages by purpose (bad news, good news), what exist are studies of “private” electronic communication (e-mail) and “public” electronic communication (discussion groups, newsgroups and lists of other types). Public computer mediated communication (CMC) is much easier to study because of its ready availability, and much of the published research deals with public CMC. Studies dealing solely with private CMC, or e-mail, are much less common and tend to deal with global concerns such as privacy issues (e.g., Cappel; Shieh), flaming (Goode; Amirrezvani) and comparing e-mail to oral and traditional written communication forms (Hawisher; Moran). One glaring exception is the work of JoAnne Yates and Wanda Orlikowski.

In 1992 Yates and Orlikowski published an article in *The Academy of Management Review* that thoughtfully explains and justifies the study of genres as an analytical tool for investigating organizational structure and change. Employing Structuration Theory (Giddens) to justify the theoretical validity of this tactic, Yates and Orlikowski define genres as organizational communications with three aspects; 1) form (structural features [e.g., formatting, lists, fields]; 2) the communication’s medium [e.g., pen and paper]; and 3) the
language or symbol system [i.e., level of formality or use of specialized vocabulary] (Yates, 300).

The main purpose of this article was to argue for the use of genre studies to get at organizational communication and change in place of the then typical studies of either media choice or media consequences (308). To explicate their point, Yates and Orlikowski trace the history of the memo genre through to its current manifestation in e-mail. While e-mail is clearly set up in memo format (to, from and subject headings), it has some characteristics distinct from paper memos because of the requirements of early e-mail programs. Early on, e-mail “To” and “From” lines sometimes contained code understandable to computers only. This may have influenced the common use of salutations (“Dear Adda”) and closings (“Regards, Mary”) similar to those found in letters, but more frequently similar to those found in informal notes (561). Some researchers would judge these practices to be aberrant genre choices that need to be avoided (Mackiewicz), but Yates and Orlikowski instead recognize these practices as “modifying existing genre rules in ways that may ultimately lead to the emergence of new genres in response to new recurrent situations” (317).

In discussing implications for future research, Yates and Orlikowski suggest investigation of “national, industrial, organizational, or occupational context” as they influence writers’ choices. “Comparative research would illuminate the range of influences across different organizations, and [. . . ] nations” (319) highlighting emerging genres and their perceived usefulness by these communities. “[G]enre studies must be situated within specific contexts and must take into account the normative scope of the genres present in that context” (322).
Later (1994), Orlikowski and Yates published another study. This study is the main precedent for the steps taken in my analyses. I discovered their study very late in my process and was pleased to find that my procedures were nearly identical to theirs.

In this later study, the authors required a communication to have a common communicative purpose and appear in a typical form to be considered a member of a genre. They coded these categories as simply present or absent. What they studied were the electronic communications of an ad hoc committee of computer programmers who were asked by the Defense Department to standardize an artificial intelligence language (LISP) from its non-compatible dialects.

Orlikowski and Yates described six possibilities for a message’s purpose such as question or response and proposal, and they described thirteen possibilities for form. Some of the form types include embedded message, nonstandard usage, opening and sign-off. Because Orlikowski and Yates employed a research assistant to perform this coding, they ran Cohen’s $k$ to determine consistency of the coding. For the topics mentioned here (e.g., question, response, embedded message), which are the topics applicable to my study, the lowest Cohen’s $k$ score was .89 meaning that an individual’s judgment is very reliable in detecting presence or absence of these types of characteristics. They found three primary genres: the memo (554), the dialogue (555), and the letter (557).

The memo was defined as a message with a subject line, no aside to individuals, no embedded message, no graphical elements, no heading, no nonstandard elements, no opening and no sign-off. They identified a total of 540 (41%) memos in their corpus. They defined a dialogue as a message with a response purpose containing an embedded message and a subject line. Of these they found 260 (20%). And finally, they defined a proposal as a
message with a proposal purpose that included the computer language they were working with (LISP) coding. There were 106 of these (8%) (556).

One feature of this genre study that may differentiate it from my own is the fact that the group producing these e-mails was a temporary alliance formed for one task that disbanded after completing its mission. These programmers did not work for one employer and, they were not in a hierarchical relationship to each other except for one person who served as the group coordinator (de facto leader). What effect these differences might have on the results in my study are discussed in chapter five.

For the purpose of my research, I needed to locate studies that would help me understand what constitutes common practice, if there is such a thing, in US business e-mail writing. So, together with the specific details found in Yates and Orlikowski's work, I also needed more generalized descriptions of business e-mail.

Another two articles address the information needed; one by Renee Horowitz and Marian Barchilon and the other by Jo Mackiewicz. A third article takes up the topic of intercultural CMC, but as explained below, it does not deal entirely with e-mail but mostly with what I have called "public" CMC.

Horowitz and Barchilon published research in 1994 concerning stylistic guidelines for e-mail in the workplace. Their three major recommendations for professional e-mail are; 1) limit e-mail length to one screen each (209); 2) use a modified memo format concerning salutations and closings (209); and 3) use clear and informative subject lines (211).

Mackiewicz published her research comparing the advice given in eleven style guides for CMC in 2003. She analyzed the frequency of recommendations, the extent to which the recommendations were stated consistently, and the extent to which the authors of the
recommendations justified them. Mackiewicz identified eight rules three of which were consistently expressed in those handbooks containing them. These three rules are to make subject headings short and descriptive, to not flame, and to not type text all in capital letters (134). Based on the justifications provided by the guidebook authors, Mackiewicz also provides a table and the conditions she recommends for following the rules, e.g., follow in all cases, or follow in intra-institutional e-mails only. This context-sensitive advice is a welcome recognition of the effect context has on any guidelines of this type.

The third article I mentioned above about intercultural CMC was written by Kirk St. Amant. His publication compares trends addressed in the CMC literature with trends addressed in the intercultural communication literature for the purpose of identifying possible areas of conflict (St. Amant, 197). Like me and many others, St. Amant supposes that differences in cultural expectations will affect the impact of intercultural communications and that this impact will become more and more pronounced because of the speed and ease of communicating electronically. He calls this area of study international digital studies, but I think he might get closer to the intent by calling it intercultural digital studies instead because cultures do not necessarily cross national lines. St. Amant takes up two issues that appear to be possible areas of difficulty in intercultural CMC; 1) creating identity in cyberspace; and 2) establishing online ethos.

Creating an identity in cyberspace could potentially be a problem in intercultural CMC, according to St. Amant, because of readers’ reliance on nothing more than the information on the screen in constructing the author, i.e. the author’s anonymity. This could cause difficulties because context is known to be influential in communication practices. Some cultures are identified as high-context and members of those cultures require specific
context-setting information in order to understand messages (201). Since CMC allows authors to create themselves on-line without the benefit of face-to-face interaction, St. Amant projects that some cultures may find CMC very difficult to interpret (202).

A possible weakness with this claim is that any communication that is not face-to-face would run the same risk as on-line communication regarding high-context preferences. And, as it relates to my study, this does not appear to apply since the CMC studied is from intra-institutional e-mail where the authors and the readers know each other personally or at the very least by position within the organization.

St. Amant’s discussion of establishing online ethos involves tactics such as using humor or wit in order to influence readers. Most of his discussion relates to public CMC (lists and discussion boards) and would not therefore directly relate to my study.

**Genre studies in Spanish writing**

Research into Spanish genre writing practices divides easily into two large categories: studies of academic writing and studies of professional writing. The older and more numerous studies deal with academic writing as one might expect considering contrastive rhetoric’s beginnings in the field of English as a Second Language discussed on page 8. The general purpose of this early research was to identify areas of difficulty for native Spanish speakers learning English, and it focused on the transfer effects of the first language on the second and subsequent languages studied. Much of this research has remained in the form of unpublished dissertations rather than published research articles, e.g., Lux, Santiago, Strei and Santana-Seda, to name a few.
Genre Studies of Academic Documents in Spanish

Genre studies of Spanish academic documents appear in two cycles or phases of emphasis.

**The earlier studies**

Ovarial work in English/Spanish contrastive rhetoric is found in the dissertations of Santiago (1970), Strei (1971), and Santana-Seda (1974). These authors contrasted the written discourse in Puerto Rican Spanish compared with written discourse in US English. Each of these studies found "striking differences in the organization" of compositions in Spanish compared to those in US English (Montaño-Harmon, 418). The Spanish compositions had "significantly higher proportions of coordinate structures, nonsequential sentences, additive constructions (additive coordination versus subordinate coordination), and one- and two-sentence paragraphs" (Kaplan 1976).

**The later studies**

Reid belongs to the next cycle of Spanish/US English contrastive rhetoric studies which occurred in the 1980s (Reppen). Some of this research took advantage of computer software that counted lexico-syntactic elements of texts. Reid studied the English writing on TOEFL exams of Arabic, Chinese, and Spanish-speaking students and compared these results to those of the writers of native English speakers (Reid). She found that, in contrast with native English speakers, native Spanish speaking writers of English wrote;

1. significantly longer sentences
2. significantly more pronouns and conjunctions
3. shorter essays
4. shorter words
5. significantly fewer content words
6. significantly fewer nouns, prepositions and passives
7. a similar number of complex sentences and adverbial subordinators.
Montano-Harmon (1991) was the first to break from the tradition of investigating the writing of college age students. Using computer software, Montano-Harmon looked at the stylistic variations among four groups of secondary school writers: 1) Mexican students in Mexico writing in Spanish; 2) native Spanish speaking Mexican-American students writing in English; 3) Mexican American students who are dominant speakers of English writing in English; and 4) native English speaking Anglo-American students, writing in English. Contrastive quantitative findings included:

1. the Mexican Spanish essays were longer than the English essays
2. the Mexican Spanish sentences tended to be run-ons
3. Mexican Spanish writers relied heavily on synonyms as a cohesive device
4. Mexican Spanish writing is organized with additive relationships
5. Mexican Spanish writing contains complete breaks in the connection between one idea and the next
6. the breaks in connection were deliberate and included transitions back to the original idea (420-422)

Montano-Harmon discusses her findings in light of the information she compiled by studying textbooks used for writing instruction in Mexico. The texts she studied all emphasized that eloquence in writing was to be obtained by use of an extensive vocabulary (synonyms, antonyms, paraphrasing and derivations); by modeling writing on exemplars from literature for tone and style; by elaborating ideas to develop the theme in greater depth; and by focusing on sentence level grammar and mechanics (418). Montano-Harmon describes Mexican Spanish writing in general as "flowery, ornate and formal" (423).

Lux in his 1991 unpublished dissertation corroborated many of the findings of the previous academic Spanish/English contrastive studies (Lux). Part of this research investigated the Spanish writing of Ecuadorian students compared to the English writing of US students (he also compared the English writing of the Ecuadorians to the Spanish writing
of the Americans). Compared to the US English essays, the Spanish essays contained more T-units\textsuperscript{9}, adjective clauses, adverbial clauses and more nominal clauses (reported in Reppen and Grabe, 117). The Spanish essays were classified as more "ornate" and formal with more overall subordination.

\textbf{Reppen and Grabe} also studied the writing of groups other than college students (Reppen), but this study focused solely on lexico-syntactic features of the writing. Reppen and Grabe compared the English writing of native Spanish-speaking children to the English writing of low-achieving English-speaking children. They concluded that their results supported previous findings and again confirmed the "ornate, flowery and formal" characteristics of Spanish-influenced writing\textsuperscript{10} (127).

\textbf{Genre Studies of Professional Documents in Spanish}

Studies of professional writing in Spanish constitute a smaller body of work than that on academic documents in Spanish. The limited number of studies precludes reporting on them by other than simple comparison. I located a total of eight research articles in US refereed journals specifically dealing with the characteristics of Spanish professional writing genres, excluding a couple of reports of questionable value (Eure; Maurial). First, I will describe these research articles and then discuss the implications of the collective findings. The most relevant of these articles to my dissertation is the work of Lorelei Ortiz because her goal is very similar to mine and is the most recent. Her research question was, "To what

\textsuperscript{9} A minimum terminal unit or the smallest part of a sentence that can stand on its own without leaving any sentence fragments.

\textsuperscript{10} Reppen and Grabe were not explicit about their reasons for comparing the work of "low-achieving" English students' work to native Spanish-speaking students' work. It is not clear why they thought this would be a comparison of comparable abilities or training.
extent does Mexican border business communication differ from US business communication and to what extent do they share features?" (33).

Ortiz undertook a study of the characteristics of the writing done by five Mexican business professionals situated along the Mexico/US border in Juárez/El Paso. Specifically, Ortiz examined 84 documents written in both English and Spanish by these owner-employees. The purpose of the documents varied from letters of introduction, to requests for and reports of price quotes to proposals defining or confirming technical information regarding business transactions (35). Ortiz sought to analyze and describe the characteristics of Mexican business writing and to confirm or disaffirm the findings of Elizabeth Tebeaux on the same topic. (I describe Tebeaux's research following Ortiz's.) Ortiz found direct and practical written communications combined with formal and conversational styles with some "residue of the legalistic, overly formal jargon" typical of an older style of business writing (39). Ortiz also found stylistic formality, long sentences and complicated clause structures "typical of written Spanish in more formal registers" (41). However, the directness and practicality that Ortiz found contradict Tebeaux's findings. I anticipate corroborating Ortiz's findings. Her recommendations for Mexican/US business communication advancement are for practitioners to avoid the self/other cultural view currently contained in much of intercultural information (c.f., Kras; Tebeaux) and to instead adopt a third space of hybrid communication practices; practices shaped by the communicators in their realities of commingled cultures and lives.
Tebeaux views the culture of one's national heritage as the overriding influence on writing practices, where Ortiz sees communication studies more dependent on context-specific "cultures". As Ortiz describes it, Tebeaux essentializes Mexican business communication as an "impermeable historical and cultural system of static and immutable Mexican values, conventions and beliefs" (Ortiz 31). Perhaps the weakest facet of Tebeaux's article is her omission of details concerning her data collection and analyses. Without greater explanation of who her informants were or how, specifically, she analyzed the documents, it is difficult to fully accept her findings.

Tebeaux's main purpose seems to be to explain why the writing practices of US business culture and Mexican business culture are as they are, as opposed to documenting what these practices are.

Because Tebeaux provides little information concerning the methods she used to analyze the documents she collected, we are left to assume she read the documents and determined their intentions based on her impressions alone. Unfortunately, of this 36-page article, only the final three pages make up the "Design consideration for Mexican business communication" section (79-81) even though the title of the article ("Designing Written Business Communication Along the Shifting Cultural Continuum: The New Face of Mexico") implies much more guidance. Tebeaux's general recommendation is to consider whether one's audience for Mexican business correspondence is a "native" organization or one heavily influenced by European or US practices (75). By "heavy influence" she apparently means the organization uses word-processing software developed in the US (77).
Tebeaux collected thirty-three documents for analysis and then limited the bulk of her discussion to twenty-five of these; she chose to emphasize letters because her sources told her that business letters were the most routine documents in business (52). "In examining the documents that I was able to study and/or copy [...] I looked at each for format, macro structure, paragraph development, sentence structure, tone and page design, topics that are the focus of instruction in U.S. business communication" (51). Tebeaux tells us that Mexican business letters

- delay mentioning the purpose of the letter, compared to US standards (56)
- contain paragraphs that progress in several directions and discuss several topics (57)
- use effusive, elegant, and opulent language (57)
- lack a tone of certainty (60)
- use a deferential tone appropriate to the rank, age and gender of the reader often sounding obsequious by US standards (61)
- exude elegance, dignity and sonorous expression (63)
- demonstrate emphasis on relationships by using long, euphonious, evasive phrases designed to express respect, honor, affection and emotion more so than business transaction (63)
- use a style that exudes dignity, strength, braggadocio, and posturing (64)

I believe Tebeaux's claims could have been much more qualified and contextualized than they were. Some facets of her article cause one to question her work. For example, on page 53 of her article, Tebeaux displays a figure of the "Structure of a Traditional Mexican Letter." From a letter's beginning to end, her figure describes these letters as comprising six sections: 1) introduction—comments establishing rapport; 2) background; 3) development; 4) news; 5) development; 6) conclusion—comments establishing rapport. She cites no one for
this information and does not tie this claim to her own findings. Another example of the article's lack of qualification or contextualization appears on page 55 where Tebeaux cites a letter from a US [sic] businessman, James Ramford, that was written in Spanish to a Mexican contact. She repeatedly refers to this letter as being a Mexican business letter even though it was written by a US (first generation Irish-American—he discusses this fact in his letter) [sic] businessman in Texas.

Thatcher

Barry Thatcher published two articles on professional documents and their development within a US religious organization's business offices in South America. (Thatcher 1998, 1999). In his first article Thatcher reviews the development of two policy and procedure documents and studies the training in and adoption of Generally Accepted Accounting Principles (GAAP) by employees of the South American offices. Thatcher employs a socio-historical lens to interpret his findings and then compares broad cultural characteristics of the US and South America looking for the causes of the differences in the employees' rhetorical assumptions and learning strategies. For example, Thatcher points to the different legal traditions of the two areas (precedent/universalist in the US and common law/particularist in South America) as having effects on the development of rhetorical practices. He concludes that South Americans, in general, prefer orality and oral-like writing because of the South American values of "collectivism, particularism, high-context communication, narrative discourse structures, and high power distance leadership" (1999, 180). In comparison, he describes US rhetorical preferences as "shaped by values of individualism, universalism, low-context communication, analytical discourse structures and consultative leadership styles" (1999, 180). Thatcher directly relates these preferences to the
different purposes and methods the colonizers of the two huge territories pursued. In other
words, Thatcher seeks to explain why the rhetorical traditions of the two areas differ, pointing
to the following as the major influences on rhetorical preferences:

- universalist/collectivist identification
- high context epistemologies, and
- high power distance in personal relationships\(^{11}\).

These cultural characteristics are dominant in management culture discussions, and, they comprise the bulk of the justification for the different management styles between US and Mexican businesses discussed in Kras and Tebeaux. The most well known proponents of and explicators of these cultural characteristics include Hofstede and Trompenaars and Hampden-Turner.

Thatcher describes South American rhetorical choices as favoring oral modes of communication (1998: 372, 1999: 181), in both style of written communication (1999: 182) and in preferred learning practices (1998: 377). He also found South American writing to employ accumulative or additive versus analytical and hierarchical organization. Thatcher suggests that the three cultural values of universalism, high contextuality and high power distance predispose Latin Americans to these rhetorical preferences. For the purposes of developing my argument, Thatcher's descriptions of the preferred writing practices within professional organizations in South America are valuable.

Agreeing with the findings of the Spanish academic writing studies discussed above (Montano-Harmon, Santana-Seda, Reid, etc.), Thatcher found that writing in South America

\(^{11}\) High power distance refers to the tendency for a culture to constitute distinct levels of hierarchy in personal and work relations.
can generally be described as organizationally flexible with circumlocutory paragraph
development and longer, more subordinated sentences that use more synonyms and more
repetition than comparable US writing. He also notes that "Spanish compositions are
organized via additive relationships with more conscious deviations, digressions, and run-on
sentences" (1998, 373). In addition to these characteristics, Thatcher describes South
American professional writing practices as different from typical US professional writing
along the following lines: the use of and the amount of detail included in context setting and
the prevalence of a narrative prose style (1999, 177).

Thatcher further explores the issues of detail and context setting in *L2 Professional
Writing in a US and South American Context* (2000). He found striking differences between
US and South American professional writing along the parameters of detail and context
setting. Thatcher describes the creation and revisions of a manual produced by a large
accounting firm in Ecuador for a US audience (*How to do Business in Ecuador*), and the
writing and re-writing of two accounting reports produced within this same firm. Each of the
documents was produced in English and in Spanish. The managing partner for the firm, a US
citizen, was "the key professional in . . . refashioning . . . Ecuadorian rhetoric for US
audiences" (45) while the writing was actually done by other employees of the firm (Latin
Americans) and translated into English by a professional translator.

The most consistent difference between the original Spanish versions of these
documents and the versions refashioned by the managing partner (hereafter called the
English versions) was in the amount of background and level of detail provided. The
Spanish versions frequently contained more historical and contextual information than the
English versions. Thatcher points to the high-context culture of Latin America as influencing
this rhetorical practice. Such a cultural value translates into communicators who "depend heavily on the communication contexts for meanings of the messages" (Hall, 1976; Rosch & Segler, 1987 quoted in Thatcher). "In unfamiliar contexts, high-context communicators have to encode specifically the contextual information, making the rhetorical forms rather concrete and detailed" (51). Being an unfamiliar form for the authors, the How to do Business in Ecuador Spanish version was decidedly detailed. US communicators, on the other hand, look for meaning in the explicitly encoded message leaving less room for influence on the rhetorical form by the context (Thatcher, 1998). The US preference is to have less detail and provide generalizations or abstract claims. To clarify this concept, Table 2.1 contains two examples from the How to do Business in Ecuador manual (48). The original translations are what ended up in the manual even though the company had specifically directed the US professional to make the manual "reader-friendly" for a US audience.

Also influencing context and levels of detail is the cultural value of particularism. South Americans are described as universalists (fond of the particular, concrete and personal) compared to people from the US, who are described as individualists

<table>
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<tr>
<th>Table 2.1</th>
<th>Original translation from Spanish to English</th>
<th>Translation revisions for US audience</th>
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<tbody>
<tr>
<td>Income tax statements are to be presented annually, at the places and on the dates established by the regulation.</td>
<td>Income tax returns are presented annually.</td>
<td></td>
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<tr>
<td>According to the labor code, in addition to other benefits granted by Social Security, employers are obligated to provide a pension to their employees after 25 years of continuous service.</td>
<td>Employers must provide their employees with a pension after 25 years of continuous service</td>
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Comparison of Ecuadorian preference for specificity compared to US preference for generalization.

(preferring the abstract). Where the native US speaker preferred to make references general and abstract (e.g., preferring the more generic "labor contracts" referring to all labor contracts
vs. the specific form "the labor contract"), the Ecuadorians preferred specific and concrete references including dates and specific numbers (e.g., 9.9 million inhabitants [US-particularist version] vs. 9, 967,979 inhabitants [Ecuador-universalist version]).

One final characteristic of Latin American writing discussed by Thatcher is the preference for originality or creativity in writing. In practice this leads to a heavy use of synonyms and a vocabulary perhaps more dynamic than that employed by US professional writers. Montaño-Harmon refers to this trait as the use of "flowery writing" (423). The heavy use of synonyms segues into the next two studies I discuss, which investigated coherence, one through topic structures and one through metatextual characteristics in English and Spanish refereed journal articles. I begin with the topic structure investigation.

**Simpson**

Researchers have determined that Spanish-language paragraphs do not follow the organizational or cohesive practices of U.S. English writing (Kaplan; Montaño-Harmon; Thatcher; Reppen and Grabe). Joellen Simpson reconfirms this finding concerning the professional writing of US and Latin American academics (Simpson). Prior to Simpson's work, the majority of Spanish writing studies investigated school writing, that is, practices of immature writers. Simpson, in contrast, investigated the paragraph structures of *mature* Spanish writers. Her intent was to be able to generalize such findings more credibly. Simpson investigated paragraph structure in articles published in refereed journals, five US English-language refereed journals and five Latin American Spanish-language refereed journals.

The lens Simpson used for studying the paragraphs was topical structure analysis (TSA) developed by Lautamatti. TSA identifies sentence elements and plots "topical
subjects onto a table to see relationships in the development of the thematic structure of the paragraph" (Simpson, 300). Sentences contain up to three topical elements: 1) the initial sentence element (ISE) which may be the subject or an introductory phrase or clause; 2) the mood subject or the grammatical subject; and 3) the topical subject which may or may not be the mood subject (300). Here's an example from Simpson's article to help clarify these concepts. Initial sentence elements are italicized, grammatical subjects are underlined, and topical subjects are bolded.

For example, one project I set involved the class devising a board game based on a nursery rhyme or folk tale for younger children. The class were reasonably enthusiastic about this until they realised that they younger children were fictional; i.e., they would not be playing these games with real children apart from each other.

After the sentence elements are identified, they are plotted onto a graph, producing a physical representation of the thematic development of the sentences. Development types identified by Lautamatti were parallel progression (two consecutive clauses with the same topical subject), extended parallel progression (topical subject that occurs in two non-consecutive clauses) and sequential progression (the rheme of a clause becomes the theme of the consecutive clause) (300). The nature of the writing to which Simpson applied TSA necessitated the addition of a fourth progression type, the extended sequential progression (rheme of a clause becomes the theme of a non-consecutive clause) (301).

Simpson found a number of interesting contrastive characteristics for the two sets of paragraphs.

- Coherence by repetition of topics is not as common in Spanish writing as in English writing (32% of the independent clauses in Spanish versus 46% in English).
• The Spanish paragraphs contained fewer parallel progressions (12.2% Spanish vs. 17.7% English).

• Spanish paragraphs had 6.6% rheme/theme sequential progression versus 16.8% for the English.

• The rheme/theme extended sequential progression is found in 2.5% of the Spanish paragraphs versus 4.4% of the English paragraphs (304-305).

In general, Simpson found "a very important difference in the internal topical structure of paragraphs in these two languages" (305). For example, she found that in English writing, authors tend to repeat key words and phrases in "what a native reader may interpret as a 'direct' line" (305). That is, "in English texts, relationships between ideas are made explicit by repetition. In the Spanish texts, relationships are not represented by repetition of key words" (305). The lack of repetition for US English readers of Latin American Spanish is an apparent break in the "connection between one idea and the next" (Montaño-Harmon, 421). This is the characteristic that Kaplan described as a proclivity for digression in Spanish writing.

The difference in statistics for sequential progression, (English 16.8% vs. Spanish 6.6%), highlights the English preference for rheme/theme constructions. In fact, rheme/theme constructions are valued as a sophisticated technique for lending coherence to a paragraph in US English (305).

Moreno

Ana Moreno, author of the second investigation of coherence in professional writing for Latin American and US writers to be discussed here, researched retrospective premise-conclusion metatext in published business and economics research articles (Moreno). Metatext, according to Moreno, adds nothing to propositional content of writing, but is
intended to help readers organize, interpret and evaluate the information in the text (322).

The goal of this study was to "examine how Spanish and English writers present a claim by means of metatext in the particular rhetorical context of a premise-conclusion sequence . . ." (323). Here is a sample from her study to demonstrate these concepts.

[. . . ] an honors section requiring a 3.5 GPA or above was polled. Out of a possible 35 students, 32 (91.4%) stated a preference for a position with an international accounting firm. These results would appear to indicate [. . .] (323).

The italicized phrase helps the reader to understand how the two sections of writing (what is given here and the conclusion that follows) relate to one another; it adds no propositional content. The metatext connects premise and conclusion.

The metatext studied included phrases signaling moves such as "these circumstances," "this means," "we can only conclude that," "the preceding subsection", and "these inconsistencies." Moreno focused on the level of implicitness of these markers or labels, the lexical range of the labels, and the choice of head nouns in these phrases, among other things.

Moreno shows that the writers of the English texts preferred implicit and explicit labels to a higher degree than the Spanish writers even though both groups used them in the same order of preference. However, the Spanish writers used fuzzy labels ("this," "all this") nearly three times as often as the English writers. Within the explicit labels, the number one choice for both groups, there is tremendous difference in the types of nouns used. Even though the first and second most preferred types of labels (research-related noun "the model, the research literature" and visual unit noun "table one, figure two") are the same, the degree to which each is used varies significantly. Perhaps most notable here is the fact that the
third-ranked out of six label nouns in English is a general noun ("this behavior" "these circumstances") while this is the last choice for the Spanish writers. Also interesting is the fact that Spanish writers used visual nouns much more frequently (26.51%) than the English writers (19.4%).

Another interesting finding relates to the types of modification the two groups of writers preferred within these premise conclusion labels. Spanish writers always used (100% of instances) ideational modification; a modification that classifies or defines the noun while the English writers used this structure just over 89% of the time. However, the English writers also used interpersonal and textual modifications. The interpersonal reveals the writers' attitude toward the referent and the textual provides organization information.

Within the ideational modifiers, a very striking difference shows up in the type of meaning the modifiers chosen by the two groups exhibit. The number one choice for the Spanish writers was to identify a precise referent (39.66%) whereas the English writers never used this type of meaning. The number one choice for the English writers was to indicate the class of the referent (41.14%). Spanish writers also employed this type of modification, but only 27.59% of the time. Recall that this tendency toward the particular on the part of the Spanish-language writers compared to the tendency toward the abstract on the part of the English-language writers was also noted in Thatcher.

**Martín**

Pedro Martín Martín, in an article in the journal *English for Specific Purposes* conducted an investigation of article abstracts written in English for international journals and in Spanish for Spanish journals (Martin). He applied Swales' "moves" model (Swales 137-165) to the introduction portion of the abstracts. Martín selected his study corpus from
respected journals in experimental phonetics and in psychology, reviewing a total of 160 abstracts, 80 each in Spanish and English. The articles were selected at random from *Phonetica, Journal of Phonetics, British Journal of Psychology* and *Applied Psycholinguistics*. Martín does not tell us whether native speakers wrote all of the articles. But from the journal titles we can discern that the English-language writing is probably not entirely U.S. English which is a change from past studies.

Swales identified common elements of research articles in US English as introduction, methods, results, and conclusion. Martín refers to these broader elements as genre sets. Genre sets are made up of the action or moves exemplified by individual genres. For example, he identifies "establish a territory" as a genre which is achieved through "claiming centrality," (another genre) both of which appear in the genre set "introduction."

Since the abstract is a synopsis of the whole article, it will mimic the construction of the research article (Salager-Meyer cited in Martín 26). Martín found that the majority of English-language articles included all four of Swales' research article elements in the abstracts (introduction, methods, results, and conclusion). Over 82.5% of the abstracts contained a methods section. The other three sections appeared in even greater percentages of the abstracts. The Spanish abstracts always contained an introduction, but had fewer occurrences of the three remaining elements (29).

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<td><strong>Element</strong></td>
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<td>Introduction</td>
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<td>Methods</td>
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<td>Results</td>
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<tr>
<td>Conclusion</td>
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*Frequency and distribution of rhetorical move elements in Martín’s study (29)*
At a more rhetorical level, Martín explains and discusses a few of the differences between the English and Spanish versions of the genre moves in the abstracts. For example, he reveals that the introductions for the English-language abstracts justified the research at a much higher rate than did the Spanish language abstracts (32). Martín also reported that in the methods section, the Spanish versions tend to be lengthier than the English versions (36). And the Spanish results sections favored present tense and active voice, in contrast to the past tense and passive voice preferred in the English results sections (37).

However, the most striking difference between the English and Spanish abstracts was in the conclusion element. In stating the conclusions realized by the research, the English abstracts were much more likely to hedge: English-language abstracts hedged the conclusions in 63.3% of the cases while Spanish-language abstracts did so in only 17.2% of the cases (40). Martín theorizes that the larger audience and the writers' relationship with the audience drive the English research articles to generalize claims and "diminish discoursal argumentative strength [to] protect themselves against criticism" from the international scientific community (40). He suggests that the smaller scientific community addressed by the Spanish writers may allow them to feel more confident in stating their conclusions directly because "the need to avoid face threatening acts is much lower" (40).

**Discussion and Analysis of Findings in Spanish Writing Genre Studies**

The safest conclusion we can draw from studies of both academic and professional writing is that Spanish-speaking writers prefer "ornate," "flowery," formal writing because it is mentioned in so many of the studies.
"Ornate" and "flowery" writing

In the case of Mexican writers, we can assume that this preference comes, at least in part, from the educational system since Montano-Harmon found that writing textbooks emphasize and model this style. I have also found in writing textbooks used in Spain (Morales, *Curso superior de redacción* and Morales, *Curso básico de redacción: de la oración al párrafo*) an emphasis on a more elaborate style of writing, in particular with regard to the use of synonyms. For example, Morales provides 13 steps for writing an expository work, which includes the recommendation to support ideas with data, details, examples, descriptions or instances of personal experience as appropriate for the theme of the paper (Morales *Curso superior de redacción*, 85). In this discussion Morales cautions against overusing words and phrases describing such overuse as "lexical poverty." He recommends the "use of pronouns and synonyms" to make up for the writer's "impoverished vocabulary" (97).

Besides addressing the overuse of nouns particular to the topic of the writing, Morales also provides guidance for enriching the variety of verbal formations and avoiding the use of very common nouns. Here he refers to verbs that have wide-ranging meaning such as *to do* and *to have* and others commonly found in colloquial speech. Some of the nouns he mentions are words such as *thing* and *question* whose use he describes again as symptomatic of "expressive poverty and monotony in writing" (98). He states that "[i]t is necessary to get greater variety and propriety in our writings by employing other words and verbs that are more appropriate and exact" (98). Morales states that a varied vocabulary is "more correct" not just "better" (98). A final example of instructing writers to use "appropriate" vocabulary

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12 I performed all of the translating work for this dissertation.
and style appears in Morales' section on argumentative writing. In this section he provides a guide for revising argumentative texts. One of the potential problems he identifies is "informal language," which he directs the writer to revise by substituting words or constructions that are more formal or more refined (195). My point in mentioning Morales' recommendations is to show a possible common ancestor of the "flowery" characteristic of Mexican Spanish writing (remember, Morales is Spanish not Mexican).

**Specificity and detail**

Thatcher's claims about particularist/universalist influences seem to be supported in Moreno's findings. Comparing the metatext of premise/conclusion constructions in Spanish and English research articles, Moreno investigates the types of nouns the writers use in these phrases. Moreno categorizes the types of head noun labels (head nouns are the "subject" nouns in clauses) as either non-metalinguistic (general category nouns) or as metalinguistic nouns (e.g., visual unit nouns that refer to tables and graphs or textual unit nouns that refer to sections or parts of the text). Moreno claims that the English-language writers' third preferred category of noun was the general noun. This is statistically different from the Spanish-language writers' use of general nouns, which ranked as their last choice in a range of six. The English writers choose referents such as "these circumstances," or "this behavior" 11.94% of the time while the Spanish writers do so 6.02% of the time (334). General nouns, obviously, serve to generalize the topic under discussion. English-language writers prefer generalization over specificity. This same tendency shows up in the preferences for modifiers in the labels. Moreno reports that the most used (39.66%) meaning for modifiers in the metatext labels for Spanish-language writers identifies the thing referred to precisely where the English-language writer *never* chose this type of modifier (336). For the English
writers, the first choice for modifiers in metatext labels is to indicate the *class* of the thing referred to (43.14%), whereas the Spanish writers chose this type of modifier 27.59% of the time (second choice). English-language writers prefer to classify objects in a topic while Spanish-language writers prefer to specify individual objects in a topic. These preferences seem to demonstrate the groups' relative preferences for universalist versus particularist language.

**Indirectness**

With regard to face-saving tactics (tactics employed to avoid the risk of ridicule), one of Moreno's findings appears to differ with one of Martín's. Moreno suggests that Spanish writers prefer fuzzy metatextual labels, labels that do not point directly at the discourse being referenced, because they may be attempting to "blur the lines of specious or spurious arguments" (337). Because we receive very little information on the corpora for Moreno's study, we do not know much about the writers except that she identifies them as English-language or Spanish-language writers in business and economics research articles. The only identification we have of the journals consulted is in a section of her article headed "Further reading" following the list of references. Here she states, "Papers from the corpora quoted in full form in the examples" and lists five article citations. These five articles were published in *The British Accounting Review, Journal of Marketing, Strategic Management, The Accounting Review,* and *Harvard Business Review.* From this information, we know that Moreno used journals in English that could have authors from different English speaking countries and with international audiences. We know nothing of the authors or audiences of

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13 Moreno claims that the writers avoid ridicule by using language that does not directly identify the referent thus allowing for interpretation and alternative explanations in the case of negative comment from peers.
the Spanish authors in Moreno's study. This is unfortunate because Martín claims that Spanish writers of research articles for Spanish audiences are much less likely to hedge, at least in conclusion sections of research articles, because "the need to avoid face threatening acts is much lower" (40) than for writers for international audiences. Because we do not have a clear idea of the audiences for the Spanish writers in Moreno's study, we cannot investigate this apparent contradiction further.

Another note concerning Martín's face saving claim (40) is that it seems counterintuitive to suggest that face saving would be less important with a smaller more closely knit group than it would be for a larger more autonomous group. Particularly in a culture where personal relationships are more highly valued than many other factors, it seems that face saving would be a critical communication strategy. An important point to mention here is that confusion in use of the word "Spanish" could be behind this discrepancy: Martín uses journals published in Spain, whereas Moreno does not specify the national or regional source of her texts.

Many of the authors of these articles use the term "Spanish speakers" when perhaps they should be using terms such as "Mexican Spanish speaker" and "Ecuadorian Spanish speaker." While it might make the reading somewhat more tedious, this practice would keep the reader focused on exactly what variant of Spanish is under discussion.

**Comments on this contrastive research**

Two trends in contrastive research in Spanish/English writing have been 1) to identify the characteristics of Spanish writing in order to identify, at a discourse level, the areas where English learners will most likely experience negative transfer effects from their first language; and 2) to test the earlier findings by conducting lexico-syntactic studies. Of
course, availability of computer analyses facilitates this kind of research, but the interpretation of what it means to prefer subordinate clauses to coordinate clauses is rather subjective. Swales' original intent to combine the strengths of the new rhetoricians with those of applied discourse analysts (Swales, 2) has not yet been achieved.

Ortiz grouped her documents by the organization that produced them and not by purpose (one appropriate method for a genre study (Foss, 193). Tebeaux studied documents with the general purpose of correspondence, which again is not a genre because the functional purposes do not enter into her classifications. Also, she left her conclusions open to question by omitting crucial details from her research description. In spite of these areas of concern in the research design, I believe we can still consider their work important to this field.

Conclusion

In concluding this discussion and analysis section, I wish to state that I hope to break with the prevalence of dichotomies in culture-related communication studies on a number of levels. For example, instead of questions or results that neatly fit into either/or classification, my research looks for either/and possibilities. Like Swales, I believe it makes sense for us to attempt to look at our subject matter more holistically. Swales discusses weaknesses in the approaches adopted by applied discourse analysis researchers and writing/composition studies researchers and claims that the weaknesses of the one are the strengths of the other (5). Applied discourse analysts investigate minute elements of written communication at profoundly deep levels while writing/composition students link textual content with context; "an activity prone to constant environmental and ecological change" (5).
The methods of writing/composition researchers often lead to a reliance on the investigator's rhetorical skill because "[i]ssues of representativeness of sample, validation of claims, and possible alternative explanations of phenomena are rarely raised or discussed" (Swales, 5). On the other hand, applied discourse analysts count a given writing feature's frequency of occurrence and report this bare number with little reference to the influence of circumstance on a writer's choices. Focusing appropriately on the context is part of what Ortiz means in her suggestion to consider a third space in cultural studies; the space where \textit{them} and \textit{us} becomes a combination of theirs and ours. I hope to broaden our understanding of this third space and how communication occurs here.
CHAPTER THREE
RESEARCH METHODS

In this chapter I describe my genre study of Mexican business e-mails. Included here is a description of my data collection process and the methods used to analyze the data.

This is a qualitative study using an interpretive approach (Neuman). I entered this study with preconceived ideas about what I would find and in fact set out to prove or disprove these ideas. The very nature of generic analysis and specifically a study of generic application (Foss, 196), which this is, precludes the possibility of entering the study without beliefs about the direction if not outcome of the study. As Foss states, the broad question in studies of generic application is, “Is this artifact successful in fulfilling the required characteristics of its genre?” (201). In developing a theory about the elements of Mexican business e-mail, I investigated a body of Mexican e-mail messages to determine whether they fulfill the requirements of a genre broadly defined as Mexican business writing. I have constructed a proposed genre (because one has not yet been published) by culling elements from Spanish-language writing studies: the studies discussed in detail in chapter two (e.g., Thatcher, Tebeaux, Martín, Ortiz, Montaño-Harmon).

My analysis seeks to determine whether Mexican business e-mails, produced by and for employees of the MP resort, contain the rhetorical characteristics of my proposed Mexican business e-mail genre as listed under my issues statements on page 66.

To perform the analysis and determine whether the messages contain the identified rhetorical characteristics, I relied heavily on the description of method in Orlikowski and
Yates' 1994 genre study. I performed a rhetorical text analysis form of discourse analysis. This approach employs a Grounded Theory framework (Strauss). I had descriptions of what previous research indicated should be present in Spanish-language writing, and I analyzed a corpus of messages to determine whether they did in fact have these characteristics.

I developed heuristics with definitions, explanations and examples of the characteristics attributed to Spanish-language writing, and I slowly read each message very closely while concentrating on one of the generic traits at a time. This means I made a minimum of five detailed readings of each message. These repeated readings helped me to refine the generic characteristics by focusing my attention and clarifying the information in the literature. This is an expected attribute of qualitative research (Neuman) and is much the same procedure as Orlikowski and Yates (Orlikowski) followed.

Data Collection

This section describes the collection of the messages and the employees who contributed them.

The E-mail Messages

In the summer of 2004, I participated in a twelve-week internship working for a Mexican time-share resort. Over the course of those twelve weeks I collected approximately 570 e-mail messages from three managers at the resort. This number represents 285 e-mails with an average of two embedded messages each.

In addition to selecting a meaningful number of messages for the study, I also needed to select a representative group of communications in order to avoid bias in claims I make.
about Mexican business e-mails written and/or received by MP employees. To this end, I
selected from the available pool of 285 e-mail groupings as follows:

1. I commingled the e-mails from each of the three writer/contributors in
   alphabetical order by subject line.

2. I selected every fifth message of the group (56 total) for study.

3. I eliminated one of these 56 messages because it turned out to be an automatic
   system-generated message informing the sender that the system was
   unable to deliver the message (message number 54). I eliminated another
   message because it was initiated by one of the (US) interns (message
   number 41).

4. I realized almost immediately that my pool of messages was actually 107
   because of the common practice of attaching or embedding original
   messages when replying to e-mails mentioned above. I numbered the
   attached messages as lettered sub-sets of the “parent” message. For
   example, message 32 has the parent plus attachments labeled b, c and d.

I collected the e-mails from personnel in upper management, middle management and
lower management. These managers’ areas were (from upper to lower) overall management
of the entire complex, Training and Development, and front-desk of one of the hotels. Table
3.1 provides a breakdown of the origin, audience direction from the author, and purpose of
the messages studied.

<table>
<thead>
<tr>
<th>Categorization of the messages</th>
<th>Origin</th>
<th>Power</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originate internally</td>
<td>92.5%</td>
<td>28%</td>
<td>41%</td>
</tr>
<tr>
<td>Originate externally</td>
<td>7.5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Audience percentages do not total 100% because of omission of 9.3% of messages where power
direction was not applicable, for example, messages from resort customers.

My primary study is a rhetorical analysis, but to facilitate context setting for the
rhetorical analysis and to investigate other elements of Mexican business writing, I also made
counts of some surface elements of the Mexican e-mails. I collected information for
common demographic influences on rhetorical choices. These influences and the options for coding them were:

1. Whether the source of the email was an internal employee; yes or no.
2. The sex of the author; male or female.
3. The sex of the primary recipient; male or female.
4. The power direction from the author to the primary recipient; up, down, lateral, not applicable, all directions.
5. The purpose of the message; to request information, to inform the recipient of something, to direct the recipient to do something.

My statistical analysis revealed only one significant correlation between these five options and the rhetorical choice options. It is statistically significant at the p<.05 level that of the four messages found to be indirect, three of them were written by a woman up the power scale to a man. Obviously, the miniscule number of occurrences makes even this finding very tentative. There were no other statistically significant findings connecting these contextual characteristics to the issues investigated.

Regarding the purpose of the messages, item five above, Orlikowski and Yates' (1994) practice differs slightly from mine in that their designation of a genre relied much more heavily on form than did mine. For example, they classified messages as memos based on their formatting describing the messages' purposes as archival. They qualify this designation in stating that “most of the participants used an electronic mail system that provided fields for the standard memo header, and the memo may thus have served as a default genre” (555). By 2004, ten years later, the memo format is indeed the standard form for e-mail messages, or at least it was at the MP resort. To label any message as a memo in my study would have been pointless because they are all in memo format. Therefore, I
elected to use the functional purpose as the underlying designator of the messages' genre: request information, report information and direct someone to do something. This more closely aligns with today's understanding of genres as rhetorical responses to situations, not necessarily as structural or format choices (Foss, 193).

Interestingly, Orlikowski and Yates defined a genre as a note if it communicated briefly, informally and relatively personally without the archival purpose of a memo (561). One of the distinguishing characteristics of a note was the inclusion of a greeting. They found greetings in 3 percent of their 2,000 (approximate) messages. My study too investigates this informal and personal tone because other e-mail research indicates that it is to be avoided (Mackiewicz).

Another point worth mentioning because it has currency later in my study is the fact that Orlikowski and Yates did not treat embedded messages (previous message content included in a reply message) as separate messages for study. They called these messages dialogue because of the appearance of two sides of a discussion in one message. I treat embedded messages as distinct messages and not merely as a reflection of one writer responding to another's message. Today's e-mail programs can be coded to automatically embed all or a part of a message when selecting the "Reply" function of the program, something that apparently was not the case in 1994. Because of this default possibility, we cannot know with certainty that a writer today doesn't simply use the Reply function in order to avoid typing the sender's e-mail address rather than for embedding and dialogic purposes.

The Writers and Contributors of the Messages

Like any resort or hotel, MP employs a significant number of employees who do not have office jobs. The majority of these workers never use computers, much less e-mail in the
course of the workday. Those employees who do use computers and e-mail are typically in management holding ranks that range from supervisor to district manager.

Even though the messages were collected from just three people, they represent the writing practices of a much larger number of authors. Embedded messages serve to significantly increase the number of messages studied and they also contribute to the diversity of author styles and choices investigated. To emphasize the fact that more than three authors' writing is represented in the body of texts, I refer to these three managers as writer/contributors. Two of the managers contributed many more messages written by other people compared to the number of messages contributed that they themselves had written. The actual number of authors represented is approximately thirty-five the vast majority of whom meet the same general qualifications of my initial description—professionals college educated in Mexico.

The first writer/contributor, A, was the resident manager of the entire hotel complex (at that time two hotels, currently three hotels) in Nuevo Vallarta. He was responsible for overall management of the existing hotels and was heavily involved in overseeing the construction and development of the newest hotel for the resort at this site.

The second writer/contributor, N, was the front-desk manager of a 200-room hotel in the group. He was responsible for the smooth running of the check-in and check-out process and for overseeing all front-desk personnel in that hotel.

The final writer/contributor, G, was the head of Training and Development in the Human Resources department of the resort. She coordinated all training, induction and developmental programs for all employees.
Each of these people was college educated with the equivalent of bachelor’s degrees from Mexican universities. None of them studied or worked in the US but they had traveled in the US and G had lived in Canada for a short period many years earlier.

Issues

Based on the findings of previous studies concerning Spanish-language writing, US English business e-mail writing, and Spanish-language business writing, my analysis seeks to confirm the following issues as they relate to Mexican business e-mails. In other words, I propose a genre of Mexican business e-mails described in the following eight issue statements.

1. **Mexican E-mail Messages Are Non-linear Using Additive Methods of Organization**

   A. Montaño-Harmon describes roundabout topic development as a characteristic typical of Spanish-language non-linear organization (418). I analyzed the messages for roundabout topic development for this reason.

   B. Tebeaux claims that non-linear organization is characterized by writing that addresses multiple topics or that progresses in multiple directions (57). Therefore, I counted chunks of text that addressed multiple topics or that progressed in multiple directions as non-linear. (57).

   C. And finally, Thatcher describes non-linear organization in Spanish language writing as using additive or accumulative means of organization (1998, 373), as did Montaño Harmon (418). So, I searched for texts that used additive or accumulative methods of organization in order to confirm this.
Non-linearity

As discussed in chapter two, the concept of linearity appears in the research of Montaño-Harmon, Tebeaux, and Thatcher. Montaño-Harmon describes Spanish expository paragraph structure as using a “round about development” that is complicated by, among other things, “an anticipatory stage before signaling the topic” with deviations from a main topic due to elaboration (419). Montaño-Harmon also comments on additive constructions saying that writers express their main idea and then proceed to add ideas to that statement (421).

Tebeaux says that Mexican business writing paragraphs “progress in several directions and discuss several topics” (57).

Thatcher addresses lack of linearity when he describes Latin American text organization as additive or accumulative as opposed to analytical or hierarchical (1998, 373).

Based on these researchers’ findings, my rhetorical analysis looked specifically for roundabout development, multi-directional topic progress and multi-topic paragraphs, and accumulative or additive organization.

2. Mexican E-mail Messages Provide Large Amounts of Specific Detail

A. Thatcher says that Latin American professional writing often contains large amounts of very highly specific detail (1998, 327; 1999, 177). I checked the messages to see if they too contained large amounts of highly specific detail.

B. I looked for texts that avoided generalization or hedging because Martín found this to be typical of Spanish-language abstract writing (40).
Specificity and detail

Specificity and detail refers to Spanish-language writers’ preference for naming the particular and citing concrete and detailed examples. Thatcher and Martín had the most to say about this topic in their research.

Thatcher pays particular attention to the universalist trait of preferring the particular. He describes both a high level of use of detail and a large amount of detail in the documents he studied (1998, 327; 1999, 177). But, in fact, Thatcher considers the use of detail and specificity or indirectness to be a highly context-sensitive choice. Whether a writer makes rhetorical choices reflecting high levels of detail and specificity or choices that reflect indirectness depends on the writer’s beliefs about his/her audience’s background knowledge. This apparent contradiction in describing Mexican business writing as both specific and detailed and as indirect is not contradictory in practice. The context determines which style the author employs.

Martín found that in the conclusion section of English-language abstracts, writers hedged or generalized claims nearly four times as often as their Spanish-language counterparts (40).

My analysis, therefore, looked for these types of writing in the Mexican e-mails—high levels of very specific detail where it might not be expected in US writing, and absence of hedging claims.

3. Mexican E-mail Messages Are Indirect

A. Texts that omit reference to what is assumed to be obvious to the reader I counted as examples of indirectness because Thatcher’s study describes
Indirectness

Thatcher, Tebeaux, Moreno and Martín all discuss indirectness in Spanish-language writing, but Tebeaux addresses it and its operationalization in detail. She identifies a high use of the impersonal *se* as a method of removing the agent through use of the [sic] reflexive tense. Tebeaux cites high usage of impersonal *se* and passive voice to avoid directness. She also describes a lack of expediency in Spanish business writing sentences stating that “directness, conciseness, and efficiency are not major issues” (64). However, I believe that the indirectness that Thatcher, Moreno and Martín address actually relates to the other side of the specificity and detail “coin” discussed immediately above in the section on specificity and detail.

According to Thatcher, when writing for new and unfamiliar situations, Latin American Spanish writers will include high levels of very specific detail in order to set the context of meaning for their readers. In familiar contexts, these same writers will omit information that is assumed to be known by their audiences (2000, 51). This phenomenon is a commonly discussed characteristic in intercultural studies such as Trompenaars and Hofstede’s works and is referred to as a culture’s high context or low context epistemology. US culture is considered low context. In communication practice this means US writers provide the same level of detail regardless of whether the situation is new or old to the audience. High context cultures such as Mexico’s provide differing levels of detail based on the reader’s presumed familiarity with the situation under discussion.
4. Mexican E-mail Messages Contain "Ornate and Flowery" Language

A. I counted formal or elegant vocabulary choices as instances of "flowery or ornate" usage because Montaño-Harmon defines "flowery or ornate" in this way (418). Also, Tebeaux uses descriptors such as "emotional and fluid" "exud[ing] elegance, dignity and sonorous expression" to describe Mexican writing, stating that meaning often "seems to be subservient to sound" (63).

"Ornate and Flowery" Language

One indication of "ornate and flowery" language may be the use of antiquated stock phrases often found in business communication—what might be called "boilerplate" wording. In Spanish, boilerplate business writing phrases include sayings such as, "Quedo a sus órdenes" (I await your direction/orders), or "Su atento y seguro servidor" (Your attentive and trusted servant). These phrases are fossilized closing statements used now through convention; I did not consider them as "flowery" or "ornate" writing.

Identifying "flowery and ornate" language is a rather subjective task; an exact definition is never offered in the literature but instead examples are often provided by the researchers. I labeled language as flowery or ornate if it did not come from everyday vocabulary and if it was used to achieve a tone of either formality or subservience, an approach that meets the spirit of Tebeaux's description of ornate language (60). This definition borders on describing a register of discourse rather than a rhetorical practice or choice but "flowery and ornate" is a decidedly subjective description in any language and is very difficult to pin down. Highlighting this subjectivity is my operationalization of this
concept by determining that language was flowery or ornate if it did not come from what I consider to be “everyday” workplace language.

5. **Mexican E-mail Messages Address Personal or Other Concerns before Broaching Business Purposes**

   A. I looked for texts that began with personal topics (such as family) and then progressed on to the business topic because Tebeaux represents this as a characteristic of Mexican business writing (54).

   B. I looked for texts that delayed mentioning the main topic of the communication because Montaño-Harmon lists this as a classic trait of Mexican writing (418).

   **Personal before Business**

   Tebeaux states that because business in Mexico “must be launched by personal contact, the traditional Mexican business letter [...] establishes rapport by commenting, in the introduction, about family and/or mutual friends” (54).

   Montaño-Harmon explains that Spanish-language writers reject abrupt starts to their texts preferring to lead the reader through an introductory or anticipatory stage before signaling the topic (418).

   I did not consider friendly salutations as personal before business moves. That is, if an author wrote, for example, “My dear Lupita” as a salutation, I did not count this as an instance of a social move before business even though the author could have used a less friendly greeting.

   For the purpose of teaching learners how to format business e-mails for Mexican readers, I adapted issues statements concerning the layout or style typically used by US
business e-mail writers. I compared US e-mail conventions with Mexican business e-mail practices. These formatting issues are:

6. **Mexican E-mail Messages Do Not Use Greetings**

   A. I noted whether the internal Mexican e-mails had greetings as did Orlikowski and Yates (1994) and, Mackiewicz (134) and Horowitz and Barchilon (209).

7. **Mexican E-mail Messages Do Not Contain Signatures**

   A. I also noted whether the Mexican e-mails had typed signatures or made use of signature blocks as opposed to letting the memo formatting of the e-mail program “From” line serve as the only identifier of the author.

8. **Mexican E-mail Messages Do Not Contain All Capital Letters**

   A. And like Mackiewicz (134), I noted Mexican e-mails that used all capital letters.

**Greetings, signatures, and the use of capital letters**

Two of the studies on US e-mail described the recommendations offered by handbooks for on-line writing and extrapolated the common writing suggestions from them and the other looked at the authors’ institution’s on-line writing practices and described them (Mackiewicz and Horowitz and Barchilon). Based on the former extrapolation, I reviewed the Mexican e-mails for the presence or absence of these same characteristics to determine whether Mexican e-mails are crafted similarly to US e-mails. Orlikowski and Yates also coded for the absence or presence of these characteristics in their (1994) study (552).

**Methods of Analysis**

This study analyzes and describes Mexican business writing with some comparisons to US business writing. Comparison in this sense does not have as its goal a judgment of
which style or practice is "correct," or "better," but rather uses comparative analysis solely for the purposes of contrast and description.

I studied the e-mail messages in their entirety: I looked to the address information to determine the power direction between the author and his/her audience; the beginning of the message for inclusion of greetings; and the message body and ending for the rhetorical analysis.

My study, like Orlikowski and Yates', uses both rhetorical and count analysis to identify characteristics not addressed in the research literature and to confirm or disaffirm the presence of other characteristics researchers have claimed mark Spanish-language business communication.

Like Atkinson (1999), Kras (1986), and Tebeaux (1999), I focused on highly contextualized microanalysis of rhetorical features. I too analyzed and interpreted data through multiple passes observing and recording patterns I saw as rhetorically significant in the linguistic usage of my chosen population of study (Ortiz, 36). My analysis was perhaps slightly simpler than that of the researchers mentioned because I was attempting to detect the presence or absence of already identified writing traits. I was not attempting to discover writing traits.

**Concluding Remarks on the Analyses**

The common perception of US business writing is that it is linear, direct and enumerative—characteristics that often make it seem simplistic or even rude in the eyes of Mexican readers (Montaño-Harmon). What then are the characteristics of Mexican business writing? After reviewing the literature, I found that researchers agree on a number of points concerning organization and construction of Mexican business writing. In addition to other
traits, researchers tend to agree that Mexican business writing texts can be described by the issues statements at the beginning of this chapter.

1. They are non-linear using additive methods of organization
2. They are specific with large amounts of detail
3. They are indirect in the sense that the writer assumes the reader understands unstated information
4. They contain "ornate and flowery" language
5. They address personal or other concerns before broaching business purposes

My sixth, seventh and eighth issues statement, Mexican e-mails do not use greetings or farewells and they do not contain all capital letters, is included because this study is of e-mail and not traditional paper memos or letters. This is the first study of Mexican workplace e-mail. The first five issues statements require rhetorical analyses to ascertain their applicability to this medium of communication, and the sixth, seventh and eighth issues require a simple visual inspection or count (present/absent). I report and discuss the results of these analyses in chapter four.
CHAPTER FOUR

RESULTS and DISCUSSION

Introduction

In this chapter, I report and discuss the results of my analyses.

The rhetorical analysis addresses issue statements one through four and the count analysis addresses issue statements five through eight. The issues state that Mexican workplace e-mail messages can be described as follows.

1. They are non-linear using additive methods of organization.
2. They are highly specific with large amounts of detail.
3. They are indirect by omitting information assumed to be understood.
4. They contain “ornate and flowery” language.
5. They address personal concerns before broaching business purposes.
6. They do not use greetings.
7. They do not contain typed signatures or contain the e-mail program’s signature block feature.
8. They do not have chunks of text made up of all capital letters.

My analyses of the 107 Mexican e-mail messages found that only item 8 is supported. All of the others are denied by the data.

Results of the Rhetorical Analysis

In this analysis I focused on Mexican writers’ rhetorical choices that contribute to a style which the literature has described as being indirect and lacking linearity while favoring specificity and inclusion of large amounts of detail. To my knowledge, this study is the first
to investigate Spanish-language e-mail in the workplace, and part of my purpose here is to
determine whether other researchers' findings concerning other written forms of
communication apply to this form of written communication. My analysis sought to
determine whether Mexican business e-mails produced by and for employees of the MP
resort contain the rhetorical characteristics listed in the issues statements.

I organize this chapter by identifying the issue, reporting the results and then
discussing why I believe these results occurred.

**Non-linear organization**

The concept of non-linearity deals with the organizational structure of text chunks,
usually paragraphs. Specifically, it refers to roundabout topic development (Montaño-
Harmon 418) or to topics that progress in several directions at once or to text chunks that
discuss several topics (Tebeaux 57), or to organization by addition or accumulation
(Thatcher, 1998, 373).

I determined that 17.7% of the messages studied were non-linear. All of the non-
linear messages were deemed so because of their use of additive organization; none had what
I would consider round-about topic development or multiple topics or topics that progress in
several directions. The remaining 82.3% of the messages are linear in construction, which
demonstrates a rather strong preference for linearly organized e-mail messages. Therefore I
can safely claim that Mexican e-mails written at the MP resort do not support the claim that
Mexican business writing is non-linear, roundabout and additive in organization.

Examples 4.1 and 4.2 below contain two messages deemed non-linear. I reproduce
the messages verbatim, by which I mean that all aspects of the message are copied here,
including the use of upper or lower case letters and the presence/absence of punctuation including diacritic marks.

Example 4.1
A. (name), IMPORTANT QUE DE FORMA PERIODICA VISITES AL C.P. C. (name) CON TODOS TUS PENDIENTES DE AMB DE LLAVES DEL DESARROLLO ESPECIALMENTE LO RELACIONADO A COMPRAS Y AUTORIZACIONES, ESTABLESCAS PRIORIDADES DE COMPRA PARA TODO EL DESARROLLO [names the three hotels], ESA ES UNA DE TUS FUNCIONES PRINCIPALES.

A. (name), IT’S IMPORTANT THAT YOU PERIODICALLY VISIT CPA C. (name) WITH ALL OF YOUR PENDINGS (ORDERS AND PURCHASES) FOR HOUSEKEEPING FOR THE ENTIRE DEVELOPMENT ESPECIALLY THOSE RELATED TO PURCHASES AND AUTHORIZATIONS, ESTABLISH PURCHASE PRIORITIES FOR THE WHOLE DEVELOPMENT [names the three hotels], IT IS ONE OF YOUR PRINCIPAL FUNCTIONS.

Example 4.2
Sr. A (name) : Aproximadamente a las 3:00 am se presento en la cajita de Seguridad la Sra X encargada de Boutique en estado de ebriedad pidiendo a seguridad que la comunicaran por telefono a su habitacion, lo cual negue el permiso.

Mr. A (name) : At approximately 3:00 am Miss X in charge of the Boutique appeared at the Security hut in a state of inebriation asking security to put her in touch with you in your dwelling by phone permission which I denied.

Example 4.1 shows a chunk of text that covers at least three topics: 1) A. is told to take her pending paperwork to the controller periodically for review; 2) she is reminded she is responsible for housekeeping supplies/purchases for the entire complex; and 3) she is told to set up purchase priorities for the whole complex because it is one of her principal functions. The three topics are separated by commas only and display accumulative organization. By this I mean the paragraph is not organized by first claiming a major topic and then following up with supporting statements; instead it addresses three topics by simply listing them. The message does not state the main idea (A. has to develop a system for tracking orders and keeping on top of the supplies needed by housekeeping) and then follow this statement with support or explanation. Example 4.2 is a message with at least four
topics contained in one long sentence: 1) Miss X who runs the boutique appeared at the security hut at 3 a.m., 2) she was drunk, 3) she wanted security personnel to call the manager in his residence, and 4) the security officer refused. Again, accumulative organization operates here.

Example 4.2 is organized more or less chronologically rather than by major idea followed by support: Miss X arrived at 3 a.m., she was drunk, she asked for a security officer to call the manager, and the security officer told her no. Each element of the message receives the same emphasis whether it is purely background (she was drunk) or the main point (she asked security to call and she was told no).

While it is not surprising that purpose influences writers' rhetorical choices—that is the thrust of much basic information concerning genre studies (Miller; Foss; Atkinson)—what is surprising is the ease with which generalizations have been applied to ill-defined categories of communications. For example, Tebeaux provides detailed information describing “Mexican written business communication” in a table on pages 80 and 81 of her article. In this table she describes the “approach” of Mexican written business communication this way: “Text is indirect and theoretical; specific implementation is indirectly stated. Required goal may be difficult to grasp (emphasis in original).” This is compared to US business communication which she describes as “practical, action oriented, and problem solving. Goal is visually clear; bulleted lists often are used (emphasis in original).”

Tebeaux appears to conflate ideas concerning the presentation of information in the sense of being direct (to the point without deviating from the main topic) with document organization. Her reference to the US practice of making bulleted lists points to document
design as it organizes information and not necessarily to a writer’s level of directness. After all, a bulleted list can contain indirect information. This is one form of generalizing; generalizing about text characteristics. She also generalizes her claims.

Her work does not clearly describe the purpose of the communications she studied. She only relates that the documents studied were “documents used in routine business dealings” and that “when asked . . . what types of documents they wrote routinely, business letters was the answer I received most often. For that reason, I focus here on business letters” (62). That is the complete description of the documents Tebeaux analyzed yet she makes claims regarding “Mexican written business communication.” I believe that some forms of written Mexican business communication may be exactly as she describes them. The issue is that it would be preferable to know exactly what she means by “Mexican business communication” in addition to “business letters.” I suggest that purpose (the current categorizing facet of genre) would be one way to distinguish between types of business letter writing and other written business communication. So, either the practices at MP are completely atypical, or Tebeaux’s claims of non-linearity do not hold for Mexican written business communication with the purposes of the messages that I studied.

Another possible reason for this result could be that e-mail communications are simply atypical. We know that the research to date on Mexican written business communication has not included them. Or perhaps the purposes of the business communications studied up until now have been very different from the purposes of the e-mails studied here. For example, Thatcher’s documents were a description and a how-to guide; the number one (out of three) purpose in the e-mails studied was to provide employees with information they needed to do their work. In the environment of quick, often informal
communication concerning the running of the MP business, Mexican written business communication is direct and coherent.

**Specificity and high levels of detail**

For purposes of this study, specific and detailed refers to the preference for naming the particular and citing the concrete “down to the penny” detail. I identified twelve messages that fit this category (11%). With only 11% of the corpus deemed specific and detailed, the remaining 89% are not as focused on specifics and details. This means the issue statement that Mexican workplace e-mail messages are specific and contain high levels of detail is not supported.

Table 4.1 displays the count analysis coding for this group of messages. Something interesting to note is that eight of these messages (66% of them) are directed down the power scale and of those eight, six give directions to subordinates.

<table>
<thead>
<tr>
<th>Doc no.</th>
<th>Source internal?</th>
<th>Auth. sex</th>
<th>Recip. sex</th>
<th>Power direction</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↓</td>
<td>direct</td>
</tr>
<tr>
<td>9</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↓</td>
<td>direct</td>
</tr>
<tr>
<td>15</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↓</td>
<td>direct</td>
</tr>
<tr>
<td>20c</td>
<td>y</td>
<td>m</td>
<td>f</td>
<td>↑</td>
<td>req</td>
</tr>
<tr>
<td>21</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↑</td>
<td>req</td>
</tr>
<tr>
<td>22</td>
<td>y</td>
<td>m</td>
<td>f</td>
<td>↓</td>
<td>direct</td>
</tr>
<tr>
<td>25</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↑</td>
<td>inform</td>
</tr>
<tr>
<td>30</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↓</td>
<td>direct</td>
</tr>
<tr>
<td>32c</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↓</td>
<td>direct</td>
</tr>
<tr>
<td>33b</td>
<td>y</td>
<td>m</td>
<td>m</td>
<td>↓</td>
<td>inform</td>
</tr>
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<td>n</td>
<td>f</td>
<td>m</td>
<td>N/A</td>
<td>req</td>
</tr>
<tr>
<td>44f</td>
<td>n</td>
<td>f</td>
<td>m</td>
<td>N/A</td>
<td>req</td>
</tr>
</tbody>
</table>

Specific and detailed messages and their count analysis coding

The fact that the purpose was usually to give an order from a superior to a subordinate may make the specificity of these messages a little surprising unless one is cognizant of the
cultural preference for patriarchal management styles in Mexico. It may seem out of
character for a manager to go into such detail in directing a subordinate’s actions, but not in
Mexico. According to Kras “[i]n Mexico there is no tradition of delegation of authority [. . .
] The boss is an extension of the autocratic, authoritarian father image. As a result,
delegation of responsibility normally takes the form of assignment of specific tasks” (45).

Here are two messages that I judged specific and detailed.

**Example 4.3**

Estimados X y Z (a person from accounting and a front desk manager),
Adjunto archivo con desgloce de Golf del Grupo Golden Gate con estancia del 1° al 8 de
Marzo, ellos Jugaran solamente 3 dias de los 5 dias contemplados en el Paquete.

1) Z, asegurar el cargo de US $13.00 por Jugador por Dia por concepto de Carrito y Caddie.

2) X, la diferencia sobrante del Credito en Golf Ingresarla a Cuartos.

3) Z, X y CP C, se deberan elaborar 3 vales de caja para hacerlos efectivo los dias 3, 5 y 6
de Marzo que son los dias de Juego para cubrir $150.00 pesos por cada Caddie, Cada
Caddie a su vez atendera a 4 Jugadores al mismo tiempo. Por lo que seran un maximo de 12
Caddies X $150.00=$1,800.00 Pesos por Cada Dia de Juego, esto se debe pagar Cash al
final de la ronda directamente a los Caddies; Mayan Country Club no nos puede facturar
este concepto.

Z, Hacer formato en forma de Lista con 12 Lineas para nombre y firma y poder recabar
nombre y firma de cada Caddie al momento de hacerles el pago, y tener soporte y control
del total pagado.

X, indicarnos si se aplica algun movimiento en la cuenta maestra del grupo reflejando el
pago de los caddies.

X, tomar nota que los Caddies y Carro de Golf se cubren con la diferencia a favor No
ejercida por el Grupo al Jugar solo 3 dias en vez de 5.

Sr. B (controller), se te presentaran los vales para firma.

En caso de dudas favor de contactarme.

Esteemed X and Z,
I’m attaching a file with an itemization of the Golden Gate Golf Group staying the first
through the eighth of March, they’ll Play only three days out of the five they had planned in
the Packet.

1) Z, verify the $13 (US) charge per Player per Day for the Cart and Caddie.

2) X, Invest the Credit overage in Golf to Rooms.
3) Z, X and CPA B, you will need to fill out three vouchers in order to make them effective the third, fifth and sixth of March which are the days (they’re) Playing in order to cover the $150 pesos for each Caddie. Each Caddie in turn will attend 4 Players at the same time. This results in a maximum of 12 Caddies times $150=$1,800 Pesos for Each Day of Play, this should be paid in Cash directly to the Caddies at the end of the round; Mayan Country Club can’t bill us for this.

Z, Make a form that is a List with 12 Lines for the name and signature and be sure to get the name and signature of each Caddie when you pay them, and have a clipboard and control over the total paid.

X, let us know if some movement in the master account applies reflecting the caddies’ payment.

X, take note that the Caddies and Golf Cart will be covered with the positive difference from the Group’s Not electing to Play except 3 days instead of 5.

Mr. B, the vouchers will be presented to you for signing.

If you have questions (doubts) please contact me.

In Example 4.3, the General Manager of the entire complex explained to a lower-level manager how to record and document the act of paying caddies for a group’s golf outings. This directive included information such as the amount to pay the caddies, and very detailed and specific information such as the suggestion to draw lines on a sheet of paper for the caddies’ signatures as they received their pay and the instruction to have a clipboard available to facilitate collecting the signatures.

Example 4.4
ESTIMADO A,
FAVOR DE PONER INFORMACION DE HORA DE LLEGADA DE LOS ESTUDIANTES EN RESERVACIONES.
M, FAVOR DE PROGRAMAR TRANSPORTACION CON SR. C. HACER LETRERO QUE DIGA: ‘BIENVENIDOS! MP NUEVO VALLARTA INTERNSHIP 2004’
X, FAVOR DE RECIBIRLOS PERSONALMENTE Y ACLARAR LAS DUDAS QUE PUEDAN TENER.
Y, COLOCAR BANDA ‘MP’.
VER PESTAÑA DE ITINERARIOS EN ARCHIVO ADJUNTO.

SALUDOS,

ESTEEMED A,
PLEASE PUT INFORMATION ON THE STUDENTS’ HOUR OF ARRIVAL IN RESERVATIONS.
M, PLEASE ARRANGE TRANSPORTATION WITH MR C. MAKE A SIGN THAT SAYS: “WELCOME! MP NUEVO VALLARTA INTERNSHIP 2004”
X, PLEASE RECEIVE THEM PERSONALLY AND CLEAR UP THE QUESTIONS (DOUBTS) THAT THEY MIGHT HAVE.
Again, Example 4.4 is from a very high level manager. He gives detailed directions to four different employees down to the specific wording for the sign that the driver was to hold while waiting for the interns at the airport. These four message recipients occupy levels in the power hierarchy ranging from one step below the high level manager (the sender) to several steps below the sender.

When Thatcher found prevalence of concrete details and a high level of specificity, he was studying an informative pamphlet (a how-to guide for conducting business in Ecuador). In that case, because the purpose of the message was not managerial, the management style would not directly influence the writing. But in my study, because management of the resort was the underlying purpose of all the e-mails, management style may have influenced communication content and organization to some extent.

Thatcher’s findings corroborate my finding when he states that “rhetorical forms in high context cultures are more variable because they are based more on the audience and author’s prior knowledge of the context (2000, 51). “In unfamiliar contexts, high-context communicators have to encode specifically the contextual information . . . which leads to highly specific and concrete rhetorical forms.” But, “in familiar situations . . . communicators can be quick and evasive in their rhetorical forms” (2000, 51). That is, we should expect specific and detailed communications when the author believes the reader will have little experience with the context of the communication and much less detail when the writer believes the reader has experience with the situation.
Whether specificity is a result of management style or rhetorical choices, it
nonetheless appears in only 11% of the business e-mail at this resort. In the MP workplace,
writers apparently do not believe their topics to be unfamiliar to their audiences otherwise the
number of specific and detailed messages would have been higher.

**Indirectness**

The analysis for indirectness focused on a tendency to avoid referring to topics
assumed to be understood by the reader.

I only found five instances of writers employing rhetorical moves displaying
indirectness (4.7%). Obviously, this disaffirms the issue statement that Spanish language
business communication is predominantly indirect. This, however, is the one issue that
revealed a statistically significant correlation (chi square .05 level) with contextual topics.
Four of the five indirect messages were written by females up the power scale to males.
However, this significance should be considered with caution because of the very small
number of items.

Here I provide an example of what I deemed to be an indirect message.

**Example 4.5**
Qué tal, G:
Sirva este medio para enviarle un saludo y al mismo tiempo anexarle las solicitudes de
ingreso para el Curso de Aplicación y Evaluación de Pruebas Psicológicas, así como
proponerle los datos de cuenta de UNIVA en el banco.
*Banco: Banamex
*Sucursal: 0341
*Núm. de cuenta: 0735236
*A nombre de: Instituto Superior Autónomo de Occidente A.C.
Quedo a sus órdenes para cualquier información adicional.

Hi, G:
By this means I send you greetings and at the same time attach the enrollment applications
for the Application and Evaluation of Psychological Tests Course, as well as provide you
with UNIVA’s bank account information.
*Bank: Banamex
*Branch: 0341
In example 4.5 the author does not tell the recipient what she needs to do with the applications (complete and return them), nor does he tell her what she is supposed to do with the bank information (wire transfer the course enrollment fees). He assumes that G understands from the context what to do with the forms and the bank information.

We do not know whether these communicants spoke about this message before or after it was received, nor do we know if there were messages asking for clarification sent after G. received this message.

As discussed above, Thatcher suggests that the level of familiarity a writer assumes her audience to have with a writing context influences the level of detail the writer will include in the document. Writers who believe their audiences to be familiar with the context will omit the information they assume the audience to know. This results in writing that has been described as indirect. Conversely, if a writer believes her audience is unfamiliar with the writing context, she will include a very high level of detail and specific information in order to set the context for the audience (1999, 183; 2000, 51). This means that claims about the level of specificity or lack thereof are directly tied to the author’s sense of her audience’s knowledge of the context. A document’s level of indirectness or specificity is context-dependent. In fact, each section of a document may fall in a different location on a continuum ranging from highly indirect to highly specific and detailed.

Obviously, the determination about a particular message’s level of directness versus specificity and detail is not an either/or determination. Some middle ground exists between

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14 In a low context culture, writers provide the same level of information almost without regard to the audience’s previous knowledge of the writing situation.
these two extremes because the bulk of the messages was found to reflect neither of these characteristics.

**“Ornate and flowery” language**

Only three of the 107 (2.8%) messages analyzed contained what I considered “flowery or ornate” language. Two of these were invitations and one message was between close friends who both work at MP. Clearly, the issue statement that Mexican business e-mails use “flowery and ornate” language is not supported by my findings. This was the most surprising result in my entire study.

I provide one example of “ornate and flowery” language in example 4.6. Remember, I did not count fossilized closings as ornate and flowery because those sayings are the accepted and conventionalized (“boilerplate”) closings for written messages at MP.

**Example 4.6**

Estimados Colegas,

Estan cordialmente invitados a hacer presencia a las 6:00 p.m. - 6:30 p.m. a un Coctel de Bienvenida a los profesores que participan en la Conferencia Academica del Programa Internship, este coctel es Hoy Jueves 8 de Julio.

Es importante su presencia pues se les presentara como los Ejecutivos de Area y Supervisores de los Estudiantes del programa de Internship.

Gracias,

Esteemed Colleagues,

You are cordially invited to make an appearance at 6:00 p.m. - 6:30 p.m. at a Welcome Cocktail [party] for the professors who participate in the Academic Conference of the Internship Program, this cocktail [party] is Today, Thursday July 8th.

Your presence is important since you will be introduced as the Area Executives and Supervisors of the Students in the Internship program.

Thanks,

Invitations makeup a genre that appears to require formal and cordial vocabulary regardless of the language they are written in. The fact that the invitations are extended at work does not appear to nullify the expectation for formality.
Virtually all of the studies of Spanish-language writing comment on “ornate and flowery” language choices, so I fully anticipated finding numerous examples in my study; however, this was not the case. Among other factors, I suspect that rather vague definitions of “ornate and flowery” may be the cause of this surprising finding.

Based on the proposition that Mexican educational institutions teach their students to use a wide array of vocabulary choices, it would intuitively make sense to suppose that learners’ writing practices would be affected by this throughout their writing careers. Montaño-Harmon’s investigation of Mexican writing textbooks and my own review of two Spanish writing textbooks indicate that this is indeed one of the goals of writing instruction; writers are encouraged to be careful with vocabulary choices and to explore different ways of expressing ideas through the use of synonyms and antonyms. Obviously, using an extensive vocabulary doesn’t necessarily lead to “ornate and flowery” language, but it seems to hint at the possibility. Why then doesn’t this manifest itself in the e-mails? Perhaps the explanation is the fact that no one clearly defines what “ornate and flowery” language is. I define “ornate and flowery” language as language that does not come from everyday vocabulary or that is used to achieve a tone of either formality or subservience.

Researchers have typically described Spanish writing as ornate and flowery without providing a definition. For example, Montaño-Harmon’s article includes these phrases on this topics: “flowery lexical items accepted for elegant;” “overly elegant language style;” paragraphs are complicated by “flowery language;” “. . . formality in the language used by Mexicans in day-to-day relationships. Ornate phrases are used unconsciously . . .” (418). However, she never provides a definition of what she means by flowery and ornate.
Tebeaux also describes the language without defining her terms. For example, she writes the following: “Mexican Spanish is emotional and fluid. Sentences in letters often suggest the rhythm and sound of poetry. Business letters frequently exude elegance, dignity, and sonorous expressions” (63).

Another reason for the common description of written Spanish as “flowery and ornate” may stem from individual researcher’s fluency in Spanish. Personal judgments about what is typical Spanish speech or writing could be very heavily influenced by a researcher’s fluency in the language. A person who is less fluent in Spanish may mistake another world-view expressed through language as an opulent use of language and not recognize it as the norm for that culture.

Perhaps the purpose and audience for the e-mail messages allow writers to use less “ornate and flowery” writing. The typical audience for the e-mail messages was internal employees for the purpose of getting the work of the enterprise done. Or, perhaps this less ornate style of writing is typical in this industry or this region of Mexico or is part of this company’s culture. I tend to believe that “flowery and ornate” may have had some meaning in a particular context some time in past research but that that context or condition has since been forgotten. I suggest that researchers have accepted the common knowledge idea of ornate and flowery language in Spanish writing without questioning exactly what that means thus continuing the belief without evidence or justification.

**Results of the Count Analysis**

Recall from chapter three that for the count analysis I coded the elements contained in Table 4.2 below. I chose the topics for their part in either setting the context for the rhetorical analysis or to affirm or disaffirm issue statements 5, 6, 7 and 8; personal before
business, salutations, typed signatures and all capital letters. These last four topics were not treated in the rhetorical analysis because they are simple present/absent determinations. This is not to say that personal greetings or salutations or capitalization do not have rhetorical impact, but I included them in my study because of US stylistic guidelines’ recommendations against their use (Mackiewicz; Horowitz and Barchilon) and because of the purpose of my study—to provide material for pedagogical uses.

Table 4.2

<table>
<thead>
<tr>
<th>Topic</th>
<th>Coding options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originates Internally</td>
<td>0=yes, 1=no</td>
</tr>
<tr>
<td>Author sex</td>
<td>0=M, 1=F</td>
</tr>
<tr>
<td>Primary recipient sex</td>
<td>0=M, 1=F</td>
</tr>
<tr>
<td>Power direction from author</td>
<td>0=Up, 1=Down, 2=Lateral, 3=N/A, 4=All directions</td>
</tr>
<tr>
<td>Purpose</td>
<td>0=Request info., 1=Inform, 2=Direct to act</td>
</tr>
<tr>
<td>Signature</td>
<td>0=Block only, flush left; 1=Block only, centered; 2=Typed &amp; block; 3=Header from only; 4=Typed only</td>
</tr>
<tr>
<td>All caps.</td>
<td>0=Yes, 1=No, 2=Excessive</td>
</tr>
<tr>
<td>Salutation</td>
<td>0=Yes, 1=No</td>
</tr>
<tr>
<td>Personal before business</td>
<td>0=No, 1=Yes</td>
</tr>
</tbody>
</table>

Topics and coding options

Table 4.3 contains the raw statistics and percentages for the topics coded.

Table 4.3

<table>
<thead>
<tr>
<th>Code</th>
<th>Origin</th>
<th>Sex</th>
<th>Recip. sex</th>
<th>Direction</th>
<th>Pur- pose</th>
<th>Sign- nature</th>
<th>Caps.</th>
<th>Salu- tation</th>
<th>Personal first</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>99</td>
<td>92.5%</td>
<td>77 74.1%</td>
<td>80 28.0%</td>
<td>30 23.4%</td>
<td>50 46.7%</td>
<td>33</td>
<td>72.9%</td>
<td>99 92.5%</td>
</tr>
<tr>
<td>1</td>
<td>8</td>
<td>7.5%</td>
<td>30 25.9%</td>
<td>28 41.1%</td>
<td>44 42.1%</td>
<td>45 5.6%</td>
<td>6</td>
<td>57.9%</td>
<td>29 7.5%</td>
</tr>
<tr>
<td>2</td>
<td>17</td>
<td>15.9%</td>
<td>37 34.6%</td>
<td>0.9%</td>
<td>1</td>
<td>11.2%</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
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<td>9.3%</td>
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<td>24</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>6</td>
<td>5.6%</td>
<td></td>
<td>26</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Results of topic counts for 107 messages

**Personal concerns before business**

Concerning the issue statement that Mexican business e-mails begin with social moves and then proceed to business matters, this is not supported for the messages I
analyzed. Only 7.5% of the Mexican e-mails began with a topic unrelated to the business at hand. Example 4.5 above is also one of the messages that contained a personal move before entering into its business topic. That message began with “¿Qué tal G?” instead of just G’s name. Another example of this type of opening follows.

HOLA
SR. R
BUENAS TARDES
DE ACUERDO A LA CONFERENCIA QUE TUVIMOS CON EL CONTACT CENTER......

HELLO
MR. R
GOOD AFTERNOON
IN ACCORDANCE WITH THE CONFERENCE THAT WE HAD WITH THE CONTACT CENTER......

This author makes three separate moves to express respect and friendliness for the recipient, however; I do not believe that friendly openings are what Tebeaux meant when she described Mexican writing as beginning with personal topics before entering the business topic of a communication. I believe she meant that writers of Mexican business communication, correspondence in her study, ask about the recipient’s family or something else personal before entering into the business purpose of the communication. I saw none of that family well-being type of move in any of the messages I collected. The reason for this may be the different purpose of the messages compared to the purpose of the communications studied by Tebeaux. The e-mail messages conducted the organization’s business on a daily basis. Letters of correspondence are crucial to an organization, but they are not the internal mechanism by which things get done. Including personal queries in routine e-mails would be truly inefficient and be perhaps more expected in non-work related messages.
Montaño-Harmon said that paragraph development in Spanish writing "rejects an abrupt start to the text, preferring to lead the reader through an introductory phase" (418) and Tebeaux said that a "traditional Mexican business letter establishes rapport by commenting, in the introduction, about family and/or mutual friends" (54). E-mail messages are not traditional Mexican business letters and they do not establish personal rapport before getting down to business. Of course, the context of the messages as internal communications would seem sufficient to preclude the use of delaying and introductory topics: these communicators all know each other or at least know of each other.

**Salutations**

Issue statement 6 says that Mexican e-mails do not include salutations. However, over 72% of the Mexican e-mails in my study did contain salutations. It seems safe to state that the issue is not supported. Considering the cultural value placed on the personal in Mexico, this finding is not surprising.

In Mexican e-mails at the MP resort, it is common practice to begin an e-mail with the recipient's name. This fact has educational implications because it is inappropriate to refer to many people by their first names in Spanish; titles are required instead. Students of Spanish as a second language would need to be careful with this practice in order to avoid offending Mexican e-mail recipients by neglecting to use appropriate titles.

**Signatures**

Only 22.4% (24) relied on the memo formatting "from" line to identify the author and contained no other form of signature or writer identification. Fifty-two point three percent (56) of the messages studied contained (programmed) signature blocks, and another 24.3%
(26) of the messages contained a typed signature without a programmed signature block. The one remaining message had both a signature block and a typed signature. So, unlike the suggestions made for drafting e-mails in the US, Mexican e-mails (at this resort) usually (77.6% of incidences) included some kind of signature apart from the “from” line of the e-mail program, and thus the issue statement that Mexican business e-mails would not use signatures is not supported by my findings.

All capital letters

The issue statement that Mexican e-mails do not contain large chunks of text written in all upper case letters holds true for nearly 58% of the 107 messages reviewed. However, thirty percent of the messages (32) do use all capital letters, and 12% of them (13) contain excessive capitalization based on standard rules of capitalization in Spanish. So in this case the issue statement is supported by my results: Mexican business e-mails DO NOT use all caps. But the fact that almost one-third of the corpus was written all in capital letters is surprising to me. I do not understand why this is the case and neither do I understand the over-capitalization characteristic.

One possible reason for the latter is US influence; unquestionably, high levels of influence from US English appear in Mexico both in the private and public sectors of language use. I do not think that the complete capitalization of messages is related to what in e-mail writing is known as flaming, although a couple of the all capitalized letters messages did appear to employ the upper case letters for emphasis based on the urgency or importance of the content. I think the simple explanation may be that the keyboard simply had the caps lock key engaged and the authors were not concerned by it.


Discussion

Why would the e-mail messages I studied contain so few of the characteristics described in the literature as being typical of Spanish language written business communication?

One answer to this question may relate to the fact that this written communication is e-mail, a medium that is still not fully described or understood by scholars in any language regardless of the purposes of the messages studied. All of the studies discussed in chapter two investigated paper documents, so the difference in medium is a major distinction between this and previous studies. The hybrid nature of e-mail (partly phone or conversation-like and partly written memo or note-like) makes it very difficult to make generalized claims about e-mail memorandum characteristics. And, one needs to be careful to not confuse medium with genre.

Yates and Orlikowski cautioned against confusing medium with genre (Yates 1992, 310). They noted that genres may be “physically created, transmitted, and stored in various media. Thus, comparing memos with electronic mail, for example, confounds the concept of communication medium with that of communication genre” (311). My study investigates the genre of memos in the medium of e-mail. I consider the messages to be memos not because of their appearance (memo layout) but because of their purposes.

Many e-mail programs lay out messages in modified memo format but that may simply be a holdover from earlier iterations that contained routing and delivery information at the head of the message. Electronic mail messages could be formatted in other ways, they just happen to look like memos today: like other computer interfaces, this design feature
could change too. My point is that the messages I studied are memos because of their purposes.

The messages I studied had the primary purpose of conducting the day-to-day business of the resort; a purpose that is quite different from documenting transactions or serving archival functions or promoting goodwill with external customers—some of the purposes of the written documents in previous studies. The fact that the e-mail messages were functional communications may at least partially answer why none of the first five issue statements held true for these messages; they were overwhelmingly linear and direct with “normal” vocabulary choices, an expected level of specificity for the culture and expected fronting of the topic at hand.

Another possible explanation for my findings may be that this specific industry or this specific site employs practices outside of the norm for Spanish language business writing. Perhaps having US and Canadian English speakers as primary customers has so heavily influenced business practices in the resort/hospitality industry or this individual resort that even the business writing practices have been influenced.

Of the last three issues, dealing specifically with e-mail traits, two also do not meet expectations. The expectations were drawn from studies of style guides for composing e-mail and from a case study of a loosely organized group completing a project for the government. The style guides indicate that writers in the workplace should not use salutations or signatures because they are inefficient; the e-mail programs already contain this information in the modified memo format therefore including this information again is redundant and inefficient. It may well be inefficient to include salutations and signatures in e-mails, but the situation should indicate whether to include a salutation and an additional
typed “signature.” Many if not most users employ the e-mail feature that includes a signature block with each message sent. The signature block contains information not contained in the “from” line, e.g., phone number, fax, address and the like and is included automatically if the author elected this option in the e-mail program. The signature block is not inefficient to include. So, perhaps the evolution of e-mail technology has rendered the suggestion to omit signatures obsolete regardless of the message’s language.

A salutation in an e-mail message can be considered superfluous, but I believe the context of the message dictates whether one should be included. In a culture like Mexico’s where the personal is so important, it would undoubtedly be seen as rude to not include salutations. One situation where salutations and typed “signatures” might seem as though they should be omitted is within embedded messages. In responding to a response to a message it would seem acceptable to omit the salutations and typed “signatures” since these messages function more like the back and forth of a conversation. But, even in this situation, the writers at MP included salutations and typed “signatures.” I believe this practice points to the importance of the person in Mexican culture.

As I suggest on page 31, instead of viewing the inclusion of salutations and signatures on e-mail messages at MP as “inappropriate,” I instead view them as one culture’s adaptation of a communication form to meet its own needs. In this case, the need to recognize the personal in the workplace overrides a need for expediency. Including salutations and signatures in e-mail messages is the appropriate practice for this site at this time.

I speculate that the overuse of capital letters in e-mail messages is based more on historical practices than current practices. Early e-mail programs did not allow for formatting of any kind. The only way to emphasize or highlight text was to use all capital
letters or other symbols to indicate one or several words were being spotlighted (e.g., some writers surround words to be emphasized with asterisks when the e-mail program does not allow text formatting). Today, of course, virtually all common e-mail programs allow for text formatting. I honestly believe that the majority of the instances of all caps in this study were due to the caps lock being engaged. In some instances, it did appear that the capitalization was intentional and for the purpose of drawing attention to the text involved. For example, I believe the author of the message in Example 4.1 above employed all caps to demonstrate urgency in the message.

In the next chapter I address the implications of my findings, describe its limitations and offer suggestions for future research and for pedagogical uses of my findings.
CHAPTER FIVE

LIMITATIONS, IMPLICATIONS FOR PEDAGOGY

and

SUGGESTIONS FOR FURTHER RESEARCH

Introduction

Recall from chapter one that my study seeks to answer the specific question, "What are the rhetorical characteristics of e-mail messages written in a Mexican workplace?" To answer this question, I collected 107 e-mail messages and analyzed them guided by eight issues statements derived from the overriding research question. In this chapter I first review the results I obtained, and then discuss the study’s limitations. Following that, I discuss the study’s pedagogical implications and finally I provide my suggestions for further research.

I found Mexican e-mails at the MP resort did not fit the description generally attributed to written Spanish language business communication (Table 5.1 reviews the results per issue). The results of my study supported only one of the eight issue statements.

Specifically, the e-mails were typically organized linearly (82.3%), contained low levels of detail (88.8%), got directly to the point of the message without initial stalling tactics (95.3%),
and did not contain "ornate and flowery" language (97.2%). Mexican e-mail messages at MP typically got straight to business without making relationship-building moves first (92.5%), and included a salutation (72.9%) and a "signature" (77.6%). The one issue that was confirmed was that the e-mail messages were usually not written in all capital letters (57.9% not all capitalized).

**Limitations**

The findings of this study, in my view, pertain to this one resort alone. To generalize these findings to other contexts (businesses, locations, writing purposes) would be to commit the same error I have repeatedly cautioned against. Until extensive research on Mexican written business genres corroborates or disproves these findings, they should be treated as conditional or at least applicable to only the very small universe of the MP resort in Nuevo Vallarta, Nayarit, Mexico.

If the basis of this study were to be replicated at other sites, I would want to improve the data collection methodology by arranging for interviews with a sampling of the authors represented in the corpus. It would have been beneficial to discuss writers' choices with them because it would have given me insight into the level of conscious rhetorical choice-making versus "automatic" writing choices. For example, I would have liked to have been able to ask Señor A. about his thoughts as he composed the message show in example 4.3 concerning the caddies and their payment. It would clarify whether his level of detail related more to management style or rhetorical convention or his own style of directing the operations of the organization. It would also be helpful to know what the security person considered as he composed the message to Señor A. about the boutique manager's 3 a.m.
visit. Is this the style he always uses to report incidents, or what influences shaped his decision to form the message in this way?

In addition to information about authors’ choices, it would also be enlightening to have information about authors’ length of service with the organization. Given a pool of writers with a range of years of service, it would be possible to examine the messages to see if job training has had a significant influence on the ways in which authors construct their messages. This information would perhaps allow for determining how much of the cultural influence was national and how much was industrial or employer-specific.

If the time constraints were different, it would also be very informative to apply my findings to another body of messages from the same corpus. Recall that I have nearly 500 messages from which these 107 were drawn. Taking this step would serve as triangulation that could confirm or disaffirm my findings for their generalizability to this site.

While “objective” studies of writing practices try to answer questions of quantity, I believe that other forms of analyses could be applied to this corpus and provide more results than just frequency measurements. With a properly constructed corpus (genre driven), studies of the type done in text linguistics could be very revealing about Spanish written business communications. Rhetorical analysis results appear subjective even when done for purposes of description and not prescription. A text linguistics analysis, though it would contain rhetorical purpose tagging per the researcher’s judgment, would allow for much more data analysis and hypothesis testing.

Concerning my choice of CIBER institutions for investigating foreign language teaching practices in the US, my understanding of the CIBER institutions was that they were business focused, but specifically international business focused. From this I expected that at
least some import would be given to language and communication since the term
international infers languages other than English. Indeed, the institutions I highlight in
chapter one (beginning on page eighteen) have stated their views on the importance of
language education in international business practice. Perhaps I should not have expected
them to have totally integrated language education with business applications.

I mentioned briefly in the text that my literature review was limited to journals
produced in the US. My research was also limited almost entirely to work with the Spanish
language. Undoubtedly, research into writing genres is being conducted in Spanish speaking
countries by Spanish speakers. I was fortunate enough to find some of this research by
investigating the ESL journals. However, this study would benefit from a broader vision of
what scholars around the world are doing in writing studies regardless of the language.

Finally, I want to make it clear that I mean no disrespect for the practices of foreign
language departments; I have benefited greatly from my classroom language studies. I am
simply impatient for foreign language departments that have the will and the resources to do
so to focus more on practical workplace uses of the languages taught. As I said in the
beginning of this dissertation, I have been waiting since the 1970s to find a program that
combines foreign language study with other marketable workplace skills—thirty-odd years is
a long wait.

Implications for Pedagogy

What meaning can we attribute to my findings and who can benefit from them?
Because my purpose for this research has been to discover insights for improving the teaching of business communication writing, the bulk of the implications from my study involve pedagogical purposes.

If or when my findings are confirmed by a number of other studies of this genre (electronic mail memoranda) and context, then suggestions for pedagogical applications from this study would include at least the following.

For the purpose of teaching business or technical writing to students preparing to write in English for native Spanish-speaking audiences, instructional material ought to emphasize the importance of paying respect to people of authority in writing practices. The determination of who is an authority varies between the two cultures and this could cause ill-will if ignored. In a business situation, failure to show respect to an audience the writer wishes to gain as a customer or client could be important enough to damage the emerging relationship. For example, in Mexico, it is common practice for people who have earned undergraduate degrees to use the title *licenciado/a*. When writing to a person who uses this title, it would be prudent to address this person as *Lic. Tal* in the greeting section of the communication or risk offending him or her. Another situation similar to this is the practice of addressing certified public accountants with the title *CP*. If a writer is in doubt, s/he should probably use at least the titles of *Señor, Señora* or *Señorita*.

Another consideration for writing e-mails in English to native Spanish-speakers would be to clearly label and separate background information for the reader. If the writer has reason to believe that the audience is thoroughly familiar with the situation under discussion, segregating it would allow readers to easily find and if desired, skip reading this information. If the audience is less than familiar with the situation, then easy accessibility to
it will also serve the audience’s need for contextualizing background. The difference in the two situations might be in the level of detail included. In the latter scenario, much more detail and specifics should be included.

Contrary to popular belief, it is not necessary to begin e-mail messages with inquiries or comments about the recipient’s family or associates if the purpose of the communication is daily operations of a business.

And finally, writers should include either the signature block feature with their e-mails or they should type a “signature” at the end of the message. It is important to be personal and personable when communicating with business people from Mexico.

Pedagogical implications for students of business writing in Spanish include all of the above suggestions plus the suggestion to use “common” language in e-mails. Spanish students learning to write for business purposes need not concern themselves with developing an ornate or flowery style of writing; they should instead concentrate on developing a straightforward and respectful tone.

**Suggestions for Further Research**

In chapter one I made a case for doing research to develop genre-specific information for English-language writers addressing Spanish-language audiences. I also suggested that materials for writing instruction in Spanish as a second language could benefit from research on genre-specific writing practices.

Mine is among the first studies of written business communication as practiced in Mexico. To enhance our understanding of Mexican writing practices and to improve our intercultural communications, in business and in other spheres, we need much more genre-
specific research. Calls for such research in intercultural communication comes from business college scholars (Varner), rhetoric and professional communication scholars (Zachry 2000), and English as a second language scholars (Connor) to name a few.

My suggestion is not new. However, I believe that it is worth repeating Upton and Connor's comments concerning the value of learning (and teaching) the written genre conventions of cultures with which we hope to communicate successfully: "[N]egotiating cultural differences in genres" ought to be "an expected part of writing for writers from one culture seeking to communicate with members of another culture" (314). To this end, identifying the purpose of a written communication, whether in electronic or paper form, should be the number one classification factor in document descriptions. Moreover, researchers need to come to a common understanding of the term genre as it is used in rhetorical and contrastive rhetoric studies. To say that written communication is characterized by a certain trait, we need to be clear about the type of written communication we refer to. In genre studies, communications are identified or described by their purpose because, among other things, purpose specifies the communicator's conventional choices.

Before the findings of my study can be further investigated, a definitional issue dealing with the "flowery and ornate" designation of Mexican writing will need to be addressed. Researchers will need to develop a more concrete and specific definition of what "flowery and ornate" means. Currently, it is not clear whether researchers find the relatively free rules of syntax in Spanish to have a bearing on the "sound" of written Spanish [Tebeaux's "effusive, elegant, and opulent language" (57), and her description of writing that exudes "elegance, dignity and sonorous expression" (63)] or whether vocabulary or some
other element is the main cause for this designation. Without a better definition, it will be very difficult to further examine the “flowery and ornate” issue.

Often included with “flowery and ornate” language is a reference to “formal” writing. To native US English speakers, the cultural trait of power distance as it is expressed in language may make Spanish appear very formal. For example, Spanish, like many other languages, distinguishes between a familiar and a formal second person or “you” (tú/usted). Recognition of a person’s relative social ranking is expressed in second person pronouns (personal, indirect, direct, and reflexive), verb conjugations, and a much more common use of titles in Spanish. For example, in the message facsimiles provided above, titles are common. Perhaps researchers of intercultural communication could benefit from more exposure to the norms of the languages under study in order to specify more clearly what they mean by labels such as “formal” when describing writing practices.

Related to the idea of power distance in a culture, it would be interesting to investigate the influence of interlocutors’ power relationships on their rhetorical choices. In addition to the use of titles when communicating “up” the power scale, what other rhetorical moves correlate with upward communication? Are there identifiable differences in communications that go down the scale or are vertically directed compared to those that go up (besides the use of titles)?

In German and French classrooms (at least), teachers have attempted to teach genres (Landa; Watts; Bell). I believe that the time is right for widespread adoption of teaching non-academic genres in the “foreign language” classroom. In order to do so, we need—as I have said elsewhere—much more research into practical genres and development of necessary instructional materials.
I would like to eventually see a collection of intercultural writing studies similar to the ovarial work of Goswami and Odell’s 1985 *Writing in nonacademic settings*. This collection, I believe, provided invaluable motivation for writing scholars and lead to an explosion in the number of genre studies and it is precisely the type of work I believe would benefit intercultural writing researchers. As I mentioned on page thirty-three, Yates and Orlikowski believe that “genre studies must be situated within specific contexts” (1992, 322) and that is one of the major positive attributes of Goswami and Odell’s work; each study in the book is a highly contextualized situation with claims couched in restricted terms.

A leading scholar in intercultural business communication, Iris Varner, discusses the challenges and opportunities of intercultural communication studies. She says:

> [t]he major challenges for intercultural management communication are 1) tying the teaching of culture clearly to business, 2) avoiding being blinded by static and traditional views of culture, and 3) recognizing the role of the self-reference criterion and the diversity within cultures. (Varner 2001, 99)

She cautions against “sophisticated stereotyping” (Osland and Bird cited in Varner) suggesting a discussion of cultural diversity to counteract this tendency (100). By sophisticated stereotyping Varner refers to the overgeneralization of the findings of researchers such as Hofstede (1980), Hall (1959), and Trompenaars (1998). These researchers very carefully point out the limitations of their findings yet the results of their studies are frequently extrapolated to all people from a culture. For example, Hofstede’s cultural dimensions are often used to develop cultural profiles of "the Chinese," "the Americans," "the Saudis," or "the Mexicans" even though Hofstede makes clear in his writing that his subjects were all male, all managers, and all from IBM. "While cultures show certain general tendencies, such as group orientation or power distance, not all groups in a
culture have the same characteristics. Diversity has many different sources and
manifestations, and we owe it to our students to discuss them” (Varner 2001, 4).

The tendency to practice sophisticated stereotyping points to the need for both on­
going research of cultural traits, because they are not static, and to the need for continued and
expanded research of genres. In conclusion, I would like to again emphasize the need to
avoid essentializing and over-generalizing in intercultural research.
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