

Situational Analysis

Practices of Technical Communication

A textbook chapter for Dr. Tracy Bridgeford's classes



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Situational Analysis: Part 1

Objectives

- To determine the circumstances of the situation
- To determine the response needed for the situation
- To determine the appropriate means of that response
- To produce the communication

Definition

Situational analysis is the reification and articulation of a communication event to a specific audience. Event refers to what's happening. Reification refers to the process of naming an event. Articulation refers to the description of the event and its meaning to the community in which it occurs. Specific audience refers to the stakeholders, that is, who's involved in the event.

Process

Situational analysis involves a series of progressive and interdependent steps used to determine the appropriate response to the situation. This process is how you figure out what and how much communication is needed.

Example

In preparation for enactment of the Enclosure Act of 2026, Dr. Danika Fields, Director of Enclosure Relocation Division (ERD) at the Institute of Global Design (IGD), plans to issue several white papers educating the public about the various environmental dangers to citizens to consider before moving inside. These white papers will be filed, periodically updated, and archived in the IGD intranet. As a technical communicator in the IGD's Documentation Department, you've been asked to write a white paper on one of the

dangers leading to the existence of the enclosure. Its underlying purpose is to convince people that moving inside the enclosure is the appropriate action to survive these dangers.

Note: White papers are documents that articulate a policy, position, or proposed action. These documents can be as short as one page or as long 1,000 pages.

Procedure

These following stages should be considered before starting to write any technical document.

Step 1

What's going on? (Reification)

This step involves identifying (reifying) the situation through a process called reification, this process determines how community members will refer to the situation. Naming is not simply a matter of choosing a name and using it; rather, naming grows out of the practice in ways that signal its significance to that practice.

Example

The situation addresses the reality of continuing to live on the earth and possibly facing death and the importance of a human exodus.

Explanation

In this sentence, the term exodus names the situation and presents the perspective.]

Step 2

What are the circumstances (Events leading to the situation)

This step describes how the situation came to be. This description needs to identify the conditions, or context, in

which the situation occurred and the significance of those conditions.

Example

In 2026, the government passed the Enclosure Act, requiring the human exodus into globe-like structures called enclosures. In direct response to an over-polluted environment, this act aimed to sustain human life.

Explanation

Providing specific information such as the date and the name of the legislation as a historical context explains how the situation came to be. The second sentence provides a reason (motivation) for the legislation.

Step 3

Why is it significant? (Interpretation)

This step identifies the meaning of the situation and its relevance to the required response. Meaning is an interpretive statement about the situation from a particular perspective.

Example

Because life inside an enclosure structure does not offer the same freedom that life on Terra did, humanity was forced to change its habits of life in ways that clearly removed previously taken-for-granted freedoms such as travel, food, and entertainment.

Explanation

The term *freedom* identifies the interpretative position. The rest of the paragraph provides a comprehensive reason for that interpretative position.

Step 4

What rhetorical action is required? (Response)

Rhetorical action refers the kind of content and its presentation required in order to respond to the situation.

What genre? What tone and style? What layout and design?
What level of reading?

Examples

Interviewing, research, brainstorming, generation of content, writing, editing, genre characteristics, production

Step 5

What are the constraints? (Limitations or opportunities)

Reactions to the white papers likely will involve varied responses: acceptance, rejection, hostility, or denial because humanity will be reacting to the fact that the earth is no longer its home.

Situational Analysis: Part 2

Identifying the scope of a rhetorical situation is the act of defining a perspective that sets boundaries for the content. It is the writer's responsibility to create these boundaries for the reader. Boundaries can be set through tactics such as time, place, terms, descriptive language, and/or topic. This aspect of situation analysis is referred to as scope.

Example

In preparation for enactment of the Enclosure Act of 2026, the director of the Enclosure Relocation Division (ERD) at the Institute of Global Design (IGD), plans to issue documents that educate the public about the various environmental dangers to citizens in preparation for moving inside. These documents will be filed, periodically updated, and archived in the IGD intranet.

Step 1

Identify the specific situation the document will address (Reification)

Example

Given the seriousness of the environmental crisis, earth residents will need to understand better the necessity of the enclosure. The goal is to educate these residents about the dangers of staying on earth.

Explanation

Using verbs like “understand” and “educated” further identify the purpose of the documentation—to teach. Language like “crisis” and “necessity” help set the tone and can lead to the identification of the focus.

Step 2

Reify the scope (Identification)

Example

For at least five years, wearing facemasks outside the home have become so familiar to residents that marketing efforts skyrocketed. These masks were soon sold in a variety of colors and patterns and styles that by 2026, residents seemed to have forgotten that their purpose is to save people from earth toxins not make them more beautiful when facing toxins.

Explanation

“Five years” and “facemasks” set time and topic boundaries of the document—its scope by situating the discussion within a timeline and identifying the focus of that discussion.

Pointing to the purpose of the masks further prepares the reader for a discussion about the role masks play in health care. A noun like “marketing” can be used to discuss greed as part of the consequences of an overpolluted earth. Mentioning

beauty, provides a more specific focus on one of the consequences of these marketing efforts.

Step 3

What rhetorical action is required? (Identifying the response)

The educational nature of the situation suggests that a white paper or a fact sheet would meet the needs of the audience. This assessment might change after completing audience analysis.

Step 4

What are the constraints? [limitations or opportunities]

Reactions to the white papers or fact sheets likely will involve varied responses: acceptance, rejection, hostility, or denial because humanity will be reacting to the fact that the earth is no longer its home.