Certified Professional Technical Communicator (CPTC)

Study Guide

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Society for Technical Communication

APMG International
Accrediting Professionals

CPTC Practitioner Syllabus

CPTC Foundation Candidate Guidance

Additional CPTC Information

CPTC™ PRACTITIONER EXAM SYLLABUS

1. Introduction

This syllabus is based on the 6th edition of Technical Communication Today by Richard Johnson-Sheehan, issued in 2018 by Pearson Education ("the Text") (ISBN-9780134425733).

The primary purpose of the syllabus is to provide a basis for accreditation of people involved with technical communication. It documents the learning outcomes and describes the scope of the requirements a candidate is expected to meet to demonstrate that these learning outcomes have been achieved at the Practitioner qualification level.

The target audience for this document is potential CPTC Foundation candidates.

2. Practitioner Qualification

2.1.   Purpose of the Practitioner Qualification

The purpose of the Practitioner qualification is to confirm whether the candidate has achieved sufficient understanding of how to apply and analyze Technical Communication guidance in a given organizational communications situation. A successful Practitioner candidate should, with suitable direction, be able to start applying the Technical Communication approaches and techniques to a real technical communication project but may not be sufficiently skilled to do this individually for all situations. Their Technical Communication expertise, complexity of the communications scenario, and the support provided for the use of Technical Communication approaches in their work environment will all be factors that impact what the Practitioner can achieve.

2.2.   Target Audience

Technical Communicators and aspiring communications managers at the journeyman level (autonomous or semi-autonomous). The qualification is also relevant to other staff involved in the design, development, and delivery of technical communication products and services, including: team leaders and stakeholders, team supports (e.g. subject matter experts), and technical writers and editors.

2.3.   High Level Performance Definition of a Successful Practitioner Candidate

The successful candidate should be able to understand and apply technical communication concepts, guidelines and processes, to offer relevant insights and ideas that can aid decision taking.

Specifically candidates should be able to:
- Plan and manage the work of technical communication teams
- Identify the different types of readers and develop reader profiles
- Define a research subject, formulate research question and develop a research methodology
- Triangulate evidence, document sources and appraise evidence for an information product
- Identify suitable content for an information product and organize the content of the product in the recommended pattern of arrangement for that product
- Identify changes required to improve the writing style of a technical communication
- Identify suitable graphics to present in a given set of data
- Identify suitable changes to improve the visual design of an information product
- Make edits to an information product appropriate for the required level of editing
- Propose an approach for usability testing an information product
- Propose appropriate Internet solutions for workplace communications.

Candidates should be able to assist in evaluating options and be able to defend their reasoning for communication choices. They should be able to advise on how to adapt their recommendations for transcultural audiences.

3. Assessment Model

Each learning outcome in the High Level Performance Definition requires the candidate to demonstrate specific knowledge and skills. For each learning outcome a number of learning outcome measures have been identified. These are evaluated in the examination, in accordance with the Examination Design, to confirm that the learning outcome has been achieved. These learning outcome measures are shown as syllabus topics and define the scope of the standard required to achieve the qualification.

A classification widely used when designing assessments for certification and education is the Bloom's Taxonomy of Educational Objectives. This classifies learning objectives into six ascending learning levels, each defining a higher degree of competencies and skills. (Bloom et al, 1956, Taxonomy of Educational Objectives).

APMG have incorporated this into a Learning Outcomes Assessment Model that is then used to develop each qualification's Assessment Model. The model provides a simple and systematic means for assessing and classifying the learning outcome measures.

This structured approach helps to ensure:
- The appropriate level is identified for a qualification
- A clear delineation in learning level content between different qualifications
- Wording is standardized and syllabi are presented consistently across APMG's qualification portfolio
- Exam questions and papers are consistent in their design.

The Foundation qualification examines at levels 1 (recall) and 2 (understand).
The Practitioner qualification tests at levels 2 (understand), 3 (apply) and 4 (analyse).

CPTC Assessment Model				
	1. Recall	**2. Understand**	**3. Apply**	**4. Analyse**
APMG Learning Level Definition	*Remember previously learned information*	*Grasp the meaning and make sense of information*	*Use information to perform a skill or task*	*Identify whether information has been used appropriately according to the rules and guidance*
Generic APMG Headers	Recall terms and key facts about concepts, principles and procedures from the reference material	Understand key facts, concepts, principles and procedures from the reference material	Apply key facts, concepts, principles and procedures to a given scenario	Differentiate between appropriate and inappropriate use of the reference material in a given scenario
Qualification Example	Recall terms and key facts relating to the syllabus area	Understand key concepts, strategies, guidelines, principles, activities and techniques relating to the syllabus area	Apply key concepts, strategies, guidelines, principles, activities and techniques relating to the syllabus area to a given scenario	Differentiate between appropriate and inappropriate use of key concepts, strategies, guidelines, principles, activities and techniques within the context of a given scenario

4. Qualification Scope

The definition of scope for each qualification is presented in the syllabus tables at the end of this document. Each syllabus area is a unit of learning that relates to the reference material or training course module.

The following syllabus areas are identified:

Syllabus Area Code	Syllabus Area Title
PP	Project Planning and Technical Communication
PA	Project Analysis and Developing a Reader Profile
CD	Content Development
OD	Organizational Design
WC	Written Communication
VC	Visual Communication
RE	Reviewing and Editing
CM	Content Management
PD	Production and Delivery

5. Syllabus Presentation

For each syllabus area, the learning outcome measures are presented in order of learning level and are introduced by a standard header. There is only one header at each learning level for each syllabus area. The wording in this header is derived from the Assessment Model. Each measure is specific to a learning level.

A tick shows the scope of each examination in the respective column to the right of the topic description.

Practitioner qualification requirements are a summation of the Foundation and Practitioner learning outcome measures. All Foundation level requirements are required for Practitioner level but are assumed to have been met and are not directly assessed again, although Foundation level knowledge and understanding will be used when demonstrating Practitioner application and analysis learning outcomes.

Each of the syllabus areas is presented in a similar format as follows:

Syllabus Area Code PA [2]		Syllabus Area : *STC Syllabus Area:* **Project Analysis** [1]	Foundation	Practitioner	Primary References
Level	Topic				
Understand the concepts, guidelines and techniques used when developing a reader profile. : [3] **Specifically to identify**					
02 [4]	01 [5]	[6] Why and how reader profiles are used: 1. Their importance for technical communication 2. The three steps for creating a reader profile	[7] ✔		[8] 1. p22-25, 29-30 2. p24-29
02	02				

Key to the Syllabus Area table

1	Syllabus Area	Unit of learning, e.g. course module, key activity area or section of the reference guide.
2	Syllabus Area Code	A unique 2 character code identifying the syllabus area.
3	Learning Level Header	Header introducing the syllabus topics (learning outcome measures) for a given learning level.
4	Level	Learning level of the learning outcome measure.
5	Topic Reference	Number of the topic within the learning level.
6	Topic Description (Learning Outcome Measure)	Precise and specific description of what is required of the candidate to demonstrate that a learning outcome has been achieved.
7	Foundation/Practitioner	Shows at which qualification level the topic is assessed. Note: A measure is only applied at one qualification level.
8	Primary Reference	The main reference supporting the learning outcome measure.

6. Important Points

The following points about the use of the syllabus should be noted.

6.1. **Text References**

The Text references provided should be considered to be indicative rather than comprehensive, i.e. there might be other valid references within the guidance.

Syllabus Area Code PP		Syllabus Area: **Project Planning and Technical Communication**	Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
Recall key terms and facts about planning and managing the work of technical communication teams **Specifically to recall:**					
01	01	The five stages of the technical writing process and how they are followed: - Planning and Researching - Organizing and Drafting - Improving Style - Designing - Revising and Editing	✔		p4
Understand the key concepts and techniques used when planning and managing the work of technical communication teams **Specifically to identify:**					
02	01	How to strategically plan the work of a technical communication team and the sequence in which they are undertaken, specifically: 1. Setting objectives 2. Creating a task list 3. Developing a timeline	✔		p48-56, 358-361
02	02	The importance of tracking progress and how brief reports, specifically progress and status reports, can help with this.	✔		p285, 296
Apply key concepts, guidelines and techniques for planning and managing the work of technical communication teams for a given scenario **Specifically to identify:**					
03	01	The planning approach and writing process a technical communication team should follow and how the work should be managed (As identified in PP0101, PP0201, PP0202)		✔	p4 p48-56, 285, 296 358-361

		Differentiate between appropriate and inappropriate use of key terms and facts for planning and managing the work of technical communication teams for a given scenario **Specifically to analyze with reasons whether:**			
04	01	The planning approach and writing process a technical communication team is following, and the way the work is being managed is appropriate (As identified in PP0101, PP0201, PP0202)		✔	p4- 11 p48-56, 285, 296 358-361

Syllabus Area Code PA		Syllabus Area: **Project Analysis and Developing a Reader Profile**	Foundation	Practitioner	Primary References (6ᵗʰ edition)
Level	Topic				
		Recall key terms and facts about the concepts and techniques for developing a reader profile. **Specifically to recall:**			

01	01	Key facts about readers and reader profiles
		1. What a reader profile is
		2. The names of the four types of readers
		   • Primary
		   • Secondary
		   • Tertiary
		   • Gatekeepers
			✔		1. p24
					2. p24-25

01	02	How readers and contexts are defined:
		1. Three aspects that determine how readers make decision
		   • Needs
		   • Values
		   • Attitudes
		2. Four contexts of document use
		   • Physical
		   • Economic
		   • Mobile
		   • Ethical
			✔		1. p23, 27
					2. p27-29

01	03	How to work with global audience 1. The five helpful strategies 2. Four aspects of a document that may need to be adjusted	✔		p30-40

		Understand the concepts, guidelines and techniques used when developing a reader profile. **Specifically to identify:**			

02	01	Why and how reader profiles are used:
		   1. Their importance for technical communication
		   2. The three steps for creating a reader profile
			✔		1. p22-25, 29-30
					2. p24-29

02	02	How to identify readers:
		   1. The role of each of the four types of readers
		   2. The guidelines on readability and readers' preferences
			✔		p12-13, 24-25

02	03	The techniques used when developing a reader profile:
		   1. How reader analysis is used to identify readers' needs, values, and attitudes
		   2. How context analysis is used to identify the contexts in which readers use documents
			✔		p26-29

		Apply key concepts, guidelines and techniques when developing a reader profile for a given scenario **Specifically to identify:**			
03	01	The types of readers of a technical communication product (As identified in PA0202)		✔	p24-25
03	02	The approach to use to develop a reader profile (As identified in PA0201 and PA0203)		✔	p12-13, p22-30
03	03	Suitable content for a reader profile (As identified in PA0203)		✔	p26-29
		Differentiate between appropriate and inappropriate use of concepts, guidelines and techniques when developing a reader profile for a given scenario **Specifically to analyze with reasons whether:**			
04	01	The types of readers for a technical communication product are appropriately identified (As identified in PA0202)		✔	p24-25
04	02	The approach used to develop the reader profile and the proposals for its use is appropriate for the given technical communication (As identified in PA0201 and PA0203)		✔	p12-13, p22-30
04	03	The content of a reader profile is appropriate for a given technical communication (As identified in PA0203)		✔	p26-29

Syllabus Area Code CD		Syllabus Area: Content Development	Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
Recall key terms and facts about developing the content of information products Specifically to recall:					
01	01	What technical genres are and how they are used	✔		p1-4
01	02	The sources used for research and the different kinds of evidence 1. The different types of primary and secondary sources of evidence 2. The three kinds of evidence solid research draws on: • Electronic • Print • Empirical	✔		1. p390-391 2. p397
Recall key terms and facts about developing the content of information products Specifically to recall:					
02	01	The types of communication situation each technical genre is typically used for and its typical content: 1. Letter, Memos and E-mail 2. Technical Descriptions and Specifications 3. Instructions and Documentation 4. Proposals 5. Brief Reports 6. Formal Reports	✔		p143, 181, 207, 247, 286, 310
02	02	How to define the research subject, specifically the use of: 1. Concept maps 2. Angles	✔		p392-394
02	03	How to formulate research questions	✔		p394
02	04	How to develop a research methodology, specifically: 1. The activities involved: • Mapping out a Methodology • Describing a Methodology • Using and Revising Your Methodology 2. The use of Concept maps to sketch out the methodology	✔		p395-397
02	05	What empirical evidence is	✔		p401-404
02	06	The importance of triangulation	✔		p404-405
02	07	How to appraise evidence to ensure its reliability and avoid plagiarism (including patchwriting).	✔		p413-416
02	08	How sources are documented, specifically: 1. When sources should be cited and the advantages of doing this 2. The use of in-text citations and a References list 3. The availability and use of different citation styles	✔		p409-412, 640-641
02	09	The concepts of: 1. Copyright 2. Trademarks and how laws for protecting intellectual property in the digital age are evolving	✔		p87-90

		Apply key concepts, activities and techniques when developing the content of information products for a given scenario			
		Specifically to identify:			
03	01	The approach for defining the research subject, formulating the research question and develop a research methodology for an information product (As identified in CD0202 – CD0204)		✓	p392-397
03	02	The approach for triangulating the evidence, documenting sources and appraising evidence for an information product (As identified in CD0205 – CD0208)		✓	p401-412
		Differentiate between appropriate and inappropriate use of concepts, activities and techniques used when developing the content of information products for a given scenario			
		Specifically to analyze with reasons whether:			
04	01	The approach to defining the research subject, formulating the research question and develop a research methodology is appropriate for an information product (As identified in CD0202 – CD0209)		✓	p392-397
04	02	The approach for triangulating the evidence, documenting sources and appraising evidence is appropriate for an information product (As identified in CD0205 – CD0208)		✓	p401-412

Syllabus Area Code OD		Syllabus Area: **Organizational Design**	Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
		Recall key terms and facts about the organization and drafting of information products			
		Specifically to recall:			

01	01	Introduction of a document
		   1. The six opening moves
		   2. How to organize the opening moves
			✓		1. p426-428
					2. p428

01	02	The major patterns of arrangement for the body of a document and how they are used	✓		p428-431
01	03	The five closing moves in a conclusion	✓		p431-443

01	04	Typical patterns for organizing each of the six technical genres:
		   1. Letter, Memos and E-mail
		   2. Technical Descriptions and Specifications
		   3. Instructions and Documentation
		   4. Proposals
		   5. Brief Reports
		   6. Formal Reports
			✓		p143, 181, 207, 247, 286, 310

		Understand the concepts and techniques used when organizing and drafting information products			
		Specifically to identify:			
02	01	*Note: Not used for the Foundation qualification*			
		Apply key concepts, activities and techniques for organizing and drafting the content of information products for a given scenario			
		Specifically to identify:			
03	01	Suitable content for an information product and the section in which that content should occur, according to the recommended pattern of arrangement for that technical genre (As identified in OD0101 to OD0104)		✔	p143, 181, 207, 247, 286, 310, 426-443
		Differentiate between appropriate and inappropriate use of concepts, activities and techniques when organizing and drafting the content of information products for a given scenario			
		Specifically to analyze with reasons whether:			
04	01	Whether a given information product has an appropriate organization and content for its recommended technical genre (As identified in OD0101 to OD0104)		✔	p143, 181, 207, 247, 286, 310, 426-443

Syllabus Area Code **WC**		**Syllabus Area:** **Written Communication**	Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
		Recall key terms and facts about composing content and communicating in the written form			
		Specifically to recall:			
01	01	Key facts about writing plain sentences: 1. The eight guidelines for writing plain sentence 2. The four types of sentences used in paragraphs	✔		1. p456 2. p458

01	02	Key facts about the different writing styles
		1. When it is appropriate to use plain writing style
		2. When it is appropriate to use persuasive writing style
		3. The differences between the plain and persuasive writing styles
		4. The four persuasion techniques:
		    • Elevate the tone
		    • Use similes and analogies
		    • Use metaphors
		    • Change the pace
			✔		1. p450
					2. p450
					3. p471
					4. p465-471

01	03	The writing strategies for improving the style and design of websites
		
		1. The four strategies for improving the writing style on websites and why these are useful:
		    • Keep sentences short
		    • Keep paragraphs short
		    • Links should reflect titles
		    • Create a consistent tone
		
		2. The writing strategies for improving the readability of websites for global audiences
			✓		1. p606
					2. p609

Understand the concepts, strategies, guidelines and techniques used when composing content and communicating in the written form **Specifically to identify**					

02	01	How to use the strategies for writing plain paragraphs:
		    1. Using the four types of sentences
		    2. Aligning sentence subjects in a paragraph
		    3. Using the "given/new" method
			✓		p460-463

02	02	How to use each of the four persuasion techniques:
		    1. Elevate the tone
		    2. Use Similes and Analogies
		    3. Use Metaphor
		    4. Change the Pace
			✓		p465-471

Apply the concepts, strategies, guidelines and techniques used when composing content and communicating in the written form in a given scenario **Specifically to identify:**					
03	01	Changes to be made to a technical communication to improve the communication's writing style using the techniques for writing in plain and persuasive styles (As identified in WC0201 and WC0202)		✓	p460-471
Differentiate between appropriate and inappropriate use of concepts, activities and techniques when organizing and drafting the content of information products for a given scenario **Specifically to analyze with reasons whether:**					
04	01	Changes proposed to a technical communication, using the techniques for writing in plain and persuasive styles, will improve the communication's writing style (As identified in WC0201 and WC0202)		✓	p460-471

Syllabus Area Code VC		Syllabus Area: **Visual Communication**	Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
Recall key terms and facts about visual communication principles and practices **Specifically to recall:**					
01	01	Key facts about visual design: 1. The five principles of visual design 2. Why good visual design is important for technical communication 3. The four different visual design considerations for culturally shallow documents	✔		1. p477-478 2. p402-503 3. p500-502
01	02	The four guidelines for using graphics in documents	✔		p508-513
01	03	The special considerations that apply when working with visuals in a presentation: • Choosing formats • Choosing fonts • Using graphics	✔		p576-578
Understand the principles and practices used when creating visual communications **Specifically to identify:**					
02	01	The visual design principle of balance 1. How it is it is used to enhance readability of information products 2. How to use page grids to create a balanced layout	✔		p478-486
02	02	The visual design principle of alignment and how it is used to add visual structure to information products	✔		p486-487
02	03	The visual design principle of grouping and how it is used to add visual structure to information products	✔		p487-492
02	04	The visual design principle of consistency and how it is used to enhance the readability of information products	✔		p492-497
02	05	The visual design principle of contrast and how it is used to enhance the readability of information products	✔		p497-499
02	06	How to visually design for global audiences: 1. Culturally deep design considerations 2. Culturally shallow design considerations 3. The guidelines for using symbols	✔		p500, 501, 524-526
02	07	How to use graphics appropriately. Specifically for each graphic type, how data is displayed and what the graphic is best used for: 1. Line 2. Bar chart 3. Table 4. Pie chart 5. Flow chart 6. Gantt chart	✔		p513-520
02	08	When to use pictures/photos and drawings in technical communications	✔		p520-524
02	09	The factors influencing the choice of presentation technology	✔		p560-563

		Apply visual communication principles and practices when creating an information product for a given scenario **Specifically to identify:**	Foundation	Practitioner	Primary References (6th edition)
03	01	When it would be appropriate to use a graphic and identify suitable graphics to present a set of given data (As identified in VC0102, VC0103 and VC0207)		✔	p508-520 p576-578
03	02	Changes needed to a given information product to improve its visual design (As identified in VC0201 – VC0205)		✔	p478-499
03	03	How to improve the visual design of a given information product for use with a global audience (As identified in VC0206, VC0208)		✔	p500,501 p520-526
		Differentiate between appropriate and inappropriate use of visual communication principles and practices when creating an information product for a given scenario **Specifically to analyze with reasons whether:**			
04	01	The proposed use of a graphic complies with the four guidelines for graphics and evaluate the strengths and limitations of the chosen graphic (As identified in VC0102, VC0103 and VC0207)		✔	p508-520 p576-578
04	02	The use of visual design principles in a given information product is appropriate for the target audience, purpose, readers and context of use (As identified in VC0201 – VC0205)		✔	p478-499
04	03	The visual design of a given information product is appropriate for use with a global audience (As identified in VC0206, VC0208)		✔	p500,501 p520-526

Syllabus Area Code **RE**		**Syllabus Area:** **Reviewing and Editing**	Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
		Recall key terms and facts about the reviewing and editing of information products **Specifically to recall:**			
01	01	Key facts about editing a document: 1. The names of the four levels of editing 2. How to determine the appropriate level of edit for a document	✔		p531-532
01	02	The importance of: 1. Document cycling 2. Usability testing	✔		p545-546
01	03	Key facts about usability testing: 1. The types of usability testing used in evaluating technical writing products 2. The four questions used to help design usability tests	✔		p546-547
01	04	The common copyediting symbols and what they mean	✔		Fig 19.9

		Understand the concepts and guidelines used when reviewing and editing information products **Specifically to identify:**			
02	01	The focus of Level 1 editing: revising and the guidelines to apply	✔		p532-534
02	02	The focus of Level 2 editing: substantive editing and the guidelines to apply	✔		p534-536
02	03	The focus of level 3 editing: copyediting and the guidelines to apply	✔		p536-538
02	04	The focus of level 4 editing: proofreading and the guidelines to apply	✔		p538-541

02	05	How different usability tests are conducted:
		   1. Read-and-Locate
		   2. Understandability tests
		   3. Performance tests
		   4. Safety tests
			✔		p547-549

02	06	The common grammatical errors found in technical documents	✔		Fig 19.5
02	07	The guidelines for creating and editing global technical documents (according to Leininger and Yuan)	✔		p544-545
		Apply the concepts and guidelines used when reviewing and editing information products for a given scenario **Specifically to identify:**			

03	01	The edits required when completing the different levels of editing on an information product:
		   • Level 1 editing
		   • Level 2 editing
		   • Level 3 editing
		   • Level 4 editing
		(As identified in RE0201 – RE0204)
				✔	p532-541

03	02	The approach to usability tests for an information product (As identified in RE0205)		✔	p547-549
		Differentiate between appropriate and inappropriate use of concepts and guidelines when reviewing and editing information products for a given scenario **Specifically to analyze with reasons whether:**			

04	01	The edits to an information product are appropriate for the required level of editing:
		   • Level 1 editing
		   • Level 2 editing
		   • Level 3 editing
		   • Level 4 editing
		(As identified in RE0201 – RE0204)
				✔	p532-541

04	02	The approach to usability tests is appropriate for an information product (As identified in RE0205)		✔	p547-549

Syllabus Area Code CM		Syllabus Area: Content Management	Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
Recall key terms and facts about team communication and collaboration, and managing the content of information products **Specifically to recall:**					
01	01	The four stages of forming a work team and their sequence (according to Tuckman)	✔		p48

01	02	Key facts about writing for websites:
		   1. The basic features of a website and how they are navigated by the reader
		   2. The guidelines for determining the number of levels needed in a website
			✔		p602-604

01	03	The different types of websites used in the workplace and what they are the commonly used for:
		   1. Social networks
		   2. Wikis
		   3. Blogs
		   4. Microblogs
		   5. Video and podcasts
			✔		p597-599, 613-614, 600-602, 610-613

Understand the concepts, principles and techniques used when communicating and collaborating in teams, and managing the content of information products **Specifically to identify:**					

02	01	The five techniques that are commonly used for generating new ideas:
		   1. Concept mapping
		   2. Brainstorming
		   3. Freewriting
		   4. Outlining/Boxing
		   5. The Five W and How Questions
			✔		p354-358

02	02	Understand how to set up and use in the workplace:
		   1. Websites
		   2. Blogs and microblogs
		   3. Social Networks
			✔		p602-609

02	03	How to collaborate effectively in technical writing teams:
		   1. The responsibilities of each of the four typical roles in a technical writing team
		   2. What happens to collaborative technical writing teams in each of the different stages of Tuckman's team building process
		   3. The strategies for managing successful virtual collaborations
		   4. How to improve the quality on a collaborative writing team
		       a. quality feedback loops
		       b. measuring outcomes against "metrics"
		       c. team performance reviews
			✔		p48-65

			Apply concepts, principles and techniques used when communicating and collaborating in teams, and managing the content of information products for a given scenario		
			Specifically to identify:		
03	01		Appropriate internet solutions for given workplace communications (As identified in CM0103 and CM0202)	✔	p597-599, 613-614, 600-613
03	02		The approach for improving quality and working collaboratively in a team (As identified in CM0203)	✔	p48-65
			Differentiate between appropriate and inappropriate use of concepts, principles and techniques used when communicating and collaborating in teams, and managing the content of information products for a given scenario		
			Specifically to analyze with reasons whether:		
04	01		Proposed internet solutions for given workplace communications are appropriate (As identified in CM0103)	✔	p597-599, 613-614, 600-613
04	02		The approach for improving quality and working collaboratively in a team is appropriate (As identified in CM0203)	✔	p48-65

Note: For the purpose of the Practitioner exam
- CM0301 and CM0401 will be included with the Syllabus Areas Written Communication and Reviewing and Editing
- CM0302 and CM0402 will be included with the Syllabus Areas Project Planning and Project Analysis

Syllabus Area Code PD	Syllabus Area: Production and Delivery		Foundation	Practitioner	Primary References (6th edition)
Level	Topic				
Recall key terms and facts about the production and delivery of information products **Specifically to recall:**					
01	01	*No topics currently for this learning level*			
Understand the concepts and techniques used when producing and delivering information products **Specifically to identify:**					
02	01	The importance of outcomes and deliverables for production and delivery. Specifically: 1. The relationship between project outcomes and final production deliverables 2. The importance of setting objectives for deliverables to effectively measure outcomes	✔		p50
		No separate level 03 and 04 topics for this – application and analysis is assessed as part of PP0301 and PP0401			

CPTC™ PRACTITIONER EXAM CANDIDATE GUIDANCE

1. INTRODUCTION

1.1.   The objectives of the examination are to enable you to demonstrate your understanding of technical communication and how to apply the technical communication guidance in an appropriate way in a given set of circumstances as described in a scenario. The Practitioner examination uses objective test questions, which require you to choose a response to a question from a set of choices for which the correct answer is pre-determined.

1.2.   The following paragraphs explain the format of the question papers, and the different types of question asked. Some suggestions on how to approach answering the various types of question are also included.

2. STRUCTURE OF THE PAPER

The examination paper consists of three booklets.

2.1   The Scenario Booklet contains a scenario providing a summary description of the organization, an overview of a proposed technical communications project and its key objectives/tasks, and a brief explanation of your role in the project. The Scenario Booklet also includes additional information for one or more of the four questions. Where additional information is to be used for a question, this is clearly stated in bold within the question header. Additional information is only to be used for the question to which it relates.

2.2   The Question Booklet contains four questions, each covering a combination of syllabus areas. The syllabus areas covered are identified at the beginning of each question. Each of the four questions contains 20 question-lines, each of which attracts 1 mark, giving a total of 80 marks. The pass mark is 56 (70%). Each of the four questions will be sub-divided into part- questions that examine different syllabus topics. The portion of the 20 marks allocated to a part-question is clearly identified at the start of the part-question.

2.3   The Answer Booklet contains the answer sheets on which the answers must be given. Unless it is clearly stated otherwise, there is only one answer to each question-line. If more than one answer is given in the answer booklet, the response line will be void.

2.4   For certain subject areas, questions are asked using the format 'Which of the following is the MOST ....'., "Which if the following is the BEST …". Whilst more than one option could be an answer, for these questions you are required to select the answer that is the best fit, given the scenario and the QUAL guidance. If you select more than one answer, the response line will be void and no mark is awarded for the question-line.

3. CPTC SYLLABUS AREAS ADDRESSED

3.1   The CPTC Syllabus contains 9 defined syllabus areas covering the theories, concepts, models, genres, and approaches to technical communication.

Syllabus Area
Project Planning and Technical Communication
Project Analysis and Developing a Reader Profile
Content Development
Organizational Design
Written Communication
Visual Communication
Reviewing and Editing
Content Management
Production and Delivery

3.2   For the purpose of the Practitioner examination, the syllabus areas will be combined/split into the following examination question areas that will be covered by a 20-mark question.

Practitioner Question Area	Syllabus Topics
Project Planning and Analysis	Project Planning + Project Analysis and Developing a Reader Profile + Two topics from Content Management (CM0302 and CM0402)
Visual Communication	Visual Communication
Content Development and Organization	Content Development + Organization Design
Writing and Editing Strategies	Written Communication + Reviewing and Editing + Two topics from Content Management (CM0301 and CM0302)

3.3.   Each question will test a minimum of 4 syllabus topics
These question areas can be presented in any order in the examination paper.

4. TYPES OF QUESTION

There are five different test types used within the paper.

4.1.   **Classic Multiple Choice Questions** – 'choose one from a list of four options'.

Answer the following questions about the contexts, which will influence users' experiences of the website.

Members typically access the website using a desktop, laptop, or tablet computer at home or work. Which of the following contexts does this inform?

    A   Physical and economic
    B   Physical and mobile
    C   Ethical and mobile
    D   Ethical and economic

4.2.   **Classic No-Yes – '**choose one from a list of possible answers, correct answer has correct explanation'

Answer the following questions about research the project team is proposing for some of the website updates.

1	One of the key update areas will be the member-only web pages. These will provide information about specialist aspects of technical communication. To help identify the new content required, the team will first produce a concept map of their research methodology. Using this, they will then identify a proposed angle for their research. Is this an appropriate approach for planning this research? A No, because the team should develop a different research methodology for gathering suitable content for each membership category. B No, because the research question should be formulated before choosing an angle and the research methodology. C Yes, because choosing an angle will help identify a suitable research question for gathering the content to meet members' needs. D Yes, because concept mapping is a good way of visually mapping the sequential steps of the research process.

4.3.   **Multiple Response** – 'choose two correct options from a list of five options'. This question follows exactly the same format as the 'Classic style', but more than one answer is required. It is the **only question type that requires more than one response to gain a mark**. Both responses must be correct to gain a mark. If more or fewer than two responses are given, then the answer will be void.

Answer the following questions about research methods.

Each of the following statements describes potential research topics for improving the content of the website, which uses WordPress. The team responsible for researching content will be composed of 2-3 individuals and will have limited time and funding. Given these constraints, the team needs to decide which two research methods or sources are the best fit for each research topic.

Remember to select **2** answers to each question.

Research Topic: Member feedback about the features and general preferences of the website they most like and dislike.

Which **two** research methods or sources would be the **BEST** fit for this topic, based on time and limited resources?

A	Existing case studies about individuals' experiences as members of TSO
B	Phone interviews with each member about their general preferences
C	Field observations of members using the website in an actual working environment
D	Questionnaires to collect members specific comments and queries on features and preferences
E	Surveys collected from the members feedback session at the annual members conference

4.4.   **Matching – '**link items in one list to items in a second list'. There is **only one correct response** to each question, but options from the second list may be used once, more than once or not at all.

Answer the following question about the use of document genres on the project.

As part of the project planning phase, you are tasked with identifying the document genres to be used when creating specific project deliverables for the website redesign.

Column 1 is a list of some of the project deliverables. For each deliverable in Column 1, select from Column 2 the **MOST** suitable document genre for this deliverable.

Each selection from Column 2 can be used once, more than once, or not at all.

	Column 1		**Column 2**
1	Summary of terms and conditions of membership.	A	Progress report
2	Request for additional funding and computing resources.	B	Formal report
		C	Instructions
3	Weekly summaries of usability testing results of prototype site.	D	Technical description
		E	Proposal
4	Research results identifying new and legacy content sources.	F	White paper
5	Monthly analysis of site analytic trends and user errors.		

4.5. **Assertion/Reason** – 'evaluate two statements (an assertion and a reason), to determine if either, both or neither is true and, if both are true, whether the reason explains why the assertion is true'.

If either statement is false, select the answer from options C, D or E. If both statements are true, a third step is required. You must then determine whether or not the reason is a correct explanation for the assertion. If the reason explains why the assertion is true, the answer is A. If it does not, the answer is B.

There is only one correct response to each question-line but options can be used once, more than once or not at all.

Answer the following question about visual design for global audiences.

The design for the original website was a culturally deep design specifically selected for North American web interfaces. An extensive use of blue was made for titles, fonts, and navigation bars.

Current web analytics and feedback from the membership department indicate that nearly 15% of members are now from Japan or Southeast Asia. The number of members from other countries is also predicted to grow significantly in the near future.

As a result, the team has been advised to update content on the website to align with guidelines for the design and use of visual information for global audiences.

Lines 1 to 5 in the table below consist of an assertion statement and a reason statement. For each line, identify the appropriate option, from options A to E, that applies. Each option can be used once, more than once, or not at all.

Option	Assertion	Reason	
A	True	True	AND the reason explains the assertion
B	True	True	BUT the reason does not explain the assertion
C	True	False	
D	False	True	
E	False	False	

	Assertion		Reason
1	As the original design was culturally deep, no changes will be required to the design conventions used.	BECAUSE	Culturally deep interfaces are designed to work across a variety of cultures.
2	In future the in-house design team should avoid the use of complex shapes when using symbols in international web pages.	BECAUSE	Standard organizations such as ISO have created a number of international symbols for cross-cultural use.
3	It would be appropriate to check whether the extensive use of the color blue throughout the website works for the Japanese audience.	BECAUSE	Where possible, colors that have negative associations for other cultures should be avoided.
4	Where photographs of members at social events are being used these will need to be re-evaluated and possibly removed.	BECAUSE	For global use, wherever possible photographs should be replaced with simple pictographs of humans.

For example, in question 2 and 3 of the example provided above, the assertion statement is true but the answer to question 2 is a B and question 3 an A.

In question 2 the reason statement is true, however the fact standard organizations have created a number of international symbols does not explain why the team should avoid the use of complex shapes in the future. The answer is B.

In question 3 the reason statement provides an explanation for the assertion. The choice of color can influence how transcultural (global) readers interpret the message, therefore when designing an interface colors that have negative associations should be avoided. The reason is true and explains the assertion. The answer is therefore A.

5. USING THE SCENARIO AND THE ADDITIONAL INFORMATION

5.1.   Where you need to refer back to details provided in the Scenario Booklet in order to answer a question, this is clearly stated in the question header.

5.2.   If the question header says '**Using the Scenario …**' you will need to refer to the scenario. Examples of the kind of information you may need to reference from a scenario include:

    5.2.1.   the key objectives or tasks of the technical communications project

    5.2.2.   technical communication products to be delivered by the project

    5.2.3.   potential readers of a technical communications product.

5.2   If the question header says '**Using the additional information provided for this question in the *Scenario Booklet'***, you need to refer to additional information provided in the Scenario Booklet for the question. The additional information is provided for use with that question only.

5.3   Some questions may need you to reference both the scenario and additional information. In this case the question header will say '**Using the Scenario and the additional information provided for this question in the *Scenario Booklet'*.**

5.4   Where there is no '**Using the Scenario ….'** statement, the scenario provides the context for the question only. There is **no need** to reference specific lines within the scenario in order to answer the question.

6. TIME MANAGEMENT

6.1.   The Practitioner examination is 100 minutes in duration. You must manage your time in order to complete all questions. As a general guide, you may wish to spend the first 10 minutes reading the scenario **(excluding the additional information**) and getting familiar with the layout of the paper. If you then allocate 20 minutes for each of the four questions, this will allow 10 minutes tolerance for any additional reading required for some questions. This suggested timing is for **guidance only**. It is expected that some questions will take longer to answer than others due to the style of question and the question's difficulty.

6.2.   No support material is permitted. This is a closed book exam.

7. EDITORIAL NOTES

7.1. General Presentation

Although you may have encountered similar terms elsewhere, the use of terminology used in the examination is as per *Technical Communication Today* (6th edition).

8. USING THE ANSWER BOOKLET WITH THE PAPER FORM

8.1. The Answer Booklets are read electronically and the results generated by computer. It is therefore essential that you follow the instructions given and mark your answers accordingly. Failure to do so may lead to delay and, in some cases, answers being void.

8.2. Record your seat number in the 3 boxes at the top. Fill in the associated ovals next to the 3 boxes as shown in the example below for candidate 004.

Seat Number

0	● 1 2 3 4 5 6 7 8 9
0	● 1 2 3 4 5 6 7 8 9
4	0 1 2 3 ● 5 6 7 8 9

8.3. Select your answers by filling in the ovals that relate to your chosen response, e.g.

	A	B	C	D	E
1	●	○	○	○	○
2	○	●	○	○	○
3	○	○	○	○	●
4	○	○	●	○	○

8.4. Fill the oval in **IN PENCIL**, **NOT PEN**. If a pen is used, the answers will not be marked. Acceptable ways to complete the answer sheets are either:

completely filling in the oval or ● ⊖ drawing a line through the centre of the oval, ensuring that between 80-100% is filled.

Any other method, including ticks or crosses, is not acceptable and may not be marked.

8.5. If you wish to change your answer during the exam, completely erase your original answer and mark your new answer. If you give more answers than required, the question will score zero.

Additional CPTC Information

1. CPTC Certifications
STC's CPTC is a three-tiered professional certification: Foundation, Practitioner, and Expert.

- The Foundation Professional Certification will focus on knowledge of the field. To achieve the Certified Professional Technical Communicator – Foundation designation, applicants will demonstrate knowledge and understanding of best practices in technical communication by passing a test.

- The Practitioner Professional Certification will demonstrate mastery of applying best practices and leading others in their use. The achievement of the Certified Professional Technical Communicator – Practitioner designation will be achieved by passing a test.

- The Expert Professional Certification requirements will be similar to the previous CPTC program, requiring a set of work products and expert interviews. (Those who have already achieved a Certified Professional Technical Communicator designation under the old program will be automatically grandfathered into the Certified Professional Technical Communicator – Expert Certification level.)

STC anticipates launching the Expert level in 2021

2. Practitioner Exam Information
There is two-tier pricing to take the exam: $360 for current STC members and $615 for nonmembers. This cost may be translated into other currencies such as the Euro at the rate applicable at the time. There is currently no discounted pricing for less-developed areas of the world. The Foundation level has no educational attainment or work experience requirement to sit the exam.

STC is working with a U.K.-based firm, APMG International, who specializes in professional certification administration, following ISO 17065 standards. The test is available online from APMG or through training organizations authorized by APMG. These trainers will combine a training session or sessions with administration of the Practitioner exam.

Applicants may register and pay for the certification online at *http://www.apmg-international.com/ CPTC.* Once an applicant has registered, he/she will have access to study documents and a sample exam. Potential applicants have one year from their registration date to take the online exam.

Online exams are administered through ProctorU. Detailed technical requirements and information about the online exam experience can be found at https://www.proctoru.com/portal/ apmg-international

3. ProctorU Pre-Exam Checklist

1. If this is your first exam with ProctorU, please visit www.proctoru.com/testitout to check your equipment before logging in. Be sure to close out any other webcam software before you visit the page.

2. Be sure you are in a well-lit, quiet and private room. The lighting of your room must be daylight quality and overhead lighting is preferred. If overhead lighting is not possible please make sure that your light source is not directly behind you because it will make it difficult for your proctor to see you.

3. Please have your photo ID ready.

4. Please bring a reflective surface such as a mirror. This is so you can show the edges of your monitor to your proctor.

5. Make sure your webcam, microphone and speakers are installed and working correctly.

6. Make sure your computer is in working order.

Once an applicant passes the test, he/she will be issued a certificate and entered into the STC certification database. His or her name will also appear on the STC and APMG websites under a list of current, certified practitioners. Certifications will be in good standing if a technical communicator keeps current with continuing education requirements.

Visit *http://www.apmg-international.com/CPTC* **for more information, to schedule your exam, or find an accredited training provider.**

4. Continuing Education Requirements

The CPTC Practitioner certification does not expire. However, for it to remain current, certificants are required to stay current in the field as demonstrated by achieving a certain number of Continuing Education Units (CEU) over a 24-month period. The CEU requirements can be found on the STC website at *http://www.stc.org/certification*. Additionally, STC will keep a list of current certified practitioners on its web site so that employers can easily verify currency. This list may expand to include other activities as the program develops. Check the STC website for complete information on acceptable CEUs.

Continuing Education Points (CEUs) may be obtained the following ways:

Event	Points
STC Annual Membership (any membership type for Foundation certificants)	2
STC Recorded Webinar (self-study)	1
STC Live Educational Webinar (free, sponsored, and community webinars excluded)	2
STC Online Courses*	6
STC Summit Pre-Conference Courses (full day)	6
STC Summit Pre-Conference Courses (half day)	3
STC Virtual Summit	4
STC Annual Summit	8
Begin and complete a college accredited course related to the Tech Comm field**	8 points per course
Published articles that relate to any aspect of Technical Communication (2/article)	2
Published books publicly available on topics related to Technical Communication (5/book)	5
Presentations at conferences related to aspects of Technical Communication (2/presentation)	2
Total needed within 2 years post-certification date	**12**

* Students must earn a certificate.   ** Adjudicated by STC once a transcript is submitted.

Published articles that relate to any aspect of Technical Communication (2 CEUs per article)
Contributions to journals, magazines, or newsletters for a professional organization or association (e.g., the STC journal Technical Communication, Intercom magazine, and STC chapter newsletters). Provide a soft copy and/or a link to the published article and where and when it was published.

Published books that are publicly available on topics related to Technical Communication (5 CEUs per book)
Published books that are publicly available on topics related to Technical Communication. Provide a soft copy and/or a link to the book,details of the book (ISBN, title, publisher, and publication date).

Presentations related to any aspect of Technical Communication at conferences (2 CEUs per presentation)
Presentation at a professional organization or commercial company or nonprofit organization conference, symposia, seminar, meeting, lecture, or workshop. Provide a soft copy and/or a link to the presentation and state where and when it was presented.

All non-STC CEU information should be collected by the certificant and emailed to STC at certification@stc.org.