Instructional Unit Module 4

Lesson: "Bottom Line Up Front" Report Writing

Formative Evaluation Report

Cindy Richard

Department of Teaching and Learning, University of Texas Rio Grande Valley

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Dr. Maria Elena Corbeil

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Introduction

The lesson "Bottom Line Up Front" Report Writing addresses a performance gap observed in young engineers. While the target audience tends to present the results of engineering processes in overly detailed and sequential, narrative reports, managers prefer succinct, summative reports in which a clear introduction contains the problem statement and recommended solution – or bottom line. This lesson teaches learners how to write a report introduction aligned with the "Bottom Line Up Front" style, and then briefly extends to considering the best organizational outline for the remainder of the report.

This paper discusses the formative evaluation phase of the ADDIE instructional design process that was used to develop the lesson. The drafted lesson materials were reviewed by subject matter expert Lynn Richard, one-on-one evaluator Sharadkumar Karangiya, and small group evaluators Mila Gelfand and Chris Gomez. Their feedback was overall positive; recommendations for improvement mostly resulted from the lesson being reviewed in draft format. For this reason, I did not make changes to the drafted materials, but have added the evaluators' suggestions to my design notes to enhance the final production of the lesson at a later date.

Instructional Goal

Learners will implement the writing strategy known as "Bottom Line Up Front," or BLUF, thereby shifting their approach to report writing from an inductive to a deductive presentation of information.

Subject Matter Expert Review

Introduction. Subject Matter Expert Lynn Richard initially described the performance gap that led to my design of this lesson. Lynn earned a BS in Chemical Engineering from Iowa State University in 1973 and an MS in Chemical Engineering from Louisiana State University in 1977. Before retiring in 2021, he was a licensed professional engineer for 45 years and a certified professional project manager for 15 years. Lynn spent 45 years in a supervisory position with a management span of control from two to 250 engineers. His positions included group leader, department manager, operations director, corporate manager, vice president, and subject matter expert. The projects he managed involved chemical, biochemical, and software engineering. Lynn observed the performance gap of young engineers' poorly organized report writing from 1980-2017.

Lynn completed his evaluation of the BLUF lesson in his home office, in one sitting, during the afternoon.

Subject Matter Expert Review Summary

Steps	SME's Comments	My Response	
1. Introductory Video	Good idea, will get nerds attention.		
2. Content Video	Good content, solid references, rough transitions, appropriate level for audience	The video demo is a draft to show content and structure; design notes include the need to improve transitions, along with several other aspects of the video.	
3. Comprehension Check	Good questions except 4 (why does the origin matter), reasonable answers with no tricks	I'm choosing to leave in the question about the origin of BLUF, as it's part of the content video. BLUF is not a standard style of technical writing in the engineering profession, but rather my own recommendation as a way to tackle the performance gap. For this reason – offering a solution out of left field, so to speak – I include the origin of BLUF and its applications across multiple industries as justification for my recommendation.	
4. Content Slides	Quick, easy to understand example. Pop up highlights provide user involvement and emphasis.		
5. Comprehension Check	More easy to understand examples and shows the right and wrong way to communicate.		

6. Writing Assignment	Nice example with typical information in chronological order as would usually be encountered. Like the transparency of the grading rubric. Should be a reasonable test of BLUF.		
7. Content Handout	Good structure for the rest of the report although it feels like "the rest of the report is left as an exercise for the student"	Agreed. The primary focus of my lesson is on writing a BLUF-aligned report introduction. The content handout and subsequent	
8. Extending the Lesson	Good outlining overview although outlining could be a whole lesson itself.	Google Form activity amount to encouragement for the learner to extend the organization of the introduction to the remainder of the report. A second lesson could be developed that focuses on writing the body of the report, but it's beyond the scope of this lesson.	
9. Closure Video	Nice idea		

Synopsis. Lynn's review offered positive feedback regarding audience appropriateness and mostly positive feedback regarding content validity and content flow. His objections regarding content validity were the inclusion of the origin of BLUF and the inadequate depth of the "Extending the Lesson" step – both of which I've discussed in my responses above. His only objection to content flow was the demo video's rough transitions, which will be addressed during production of the lesson at a later date. I have not made any short-term changes to the draft materials as a result of his review.

One-to-One Evaluation

Introduction. One-on-one reviewer Sharadkumar Karangiya's credentials, by self-report, include "MS, MSc, BSc, Data Analyst." As Kumar is coming from a STEM background while my background is in English and K12 education, we found it convenient to exchange our lessons for review. Kumar reports that he completed his review of my lesson in his home office. I was unable to observe him working on the

lesson, but created a form for him to record the minutes spent on each step, as well as his observations and feedback regarding "content flow and clarity, degree of interest/ engagement, and degree of confidence in learning."

One-to-one Evaluation Summary

Steps	Kumar's Observations and Feedback	My Response
1. Introductory Video	2.5 to 3 minutes. The introduction is very strong and captivating. The introduction uses eye-opening examples that compel learners to pay attention. I guess you have used BLUF in the introduction itself. Nice job.	
2. Content Video	4.5 minutes. The demo video presents the content in a concerted way, ensuring an optimal attention span for learners. However, I have noticed that the demo video lacks some design elements.	Agreed. The demo is a draft; design notes include plans for production.
3. Comprehension Check	2 minutes. I have tried the comprehension check by myself. Each question tests what has been covered so far, and it's really straightforward. This type of short questionnaire helps learners to store information in their long-term memory.	
4. Content Slides	5 minutes. The slides were very helpful for me to get an understanding of what was to be written when writing a report using BLUF.	
5. Comprehension Check	3 minutes.	

6. Writing Assignment	2 minutes (to read the directions.) I liked the structure of the assessment you put in your IU; it literally aids how to write a report based on the BLUF principle step-by-step.	
7. Content Handout	1.5 minutes.	
8. Extending the Lesson	1.5 minutes.	
9. Closure Video	3 to 4 minutes.	

Synopsis. Kumar's review was brief and positive regarding content flow and clarity, degree of interest/ engagement, and degree of confidence in learning. His only objection was to the rough demo video, which will be addressed in production. Kumar's feedback did not lead me to make any short-term changes to the draft materials.

Small Group Evaluation

Introduction. Of the four learners I requested to participate in my small group, two were able to provide a review of the lesson in the given time frame. Neither is a member of my ideal target audience, although both are close to the age group, and one is an engineer. Mila Gelfand recently graduated from Los Alamos High School with honors. She will study astrophysics at the New Mexico Institute of Mining and Technology in the fall. While Mila has chosen to pursue a STEM degree and career, she is also a capable and adaptable writer, and thus approached the review more as a peer than as a member of the target audience. Chris Gomez is the reviewer closest to the target audience. He completed an MS in Mechanical Engineering from New Mexico State University two years ago and has been working at the naval shipyards in Groton, Connecticut. While he fits the description of a "young engineer," he reports that he studied technical writing in college. It is unlikely that Chris shows the performance gap; however, his proximity to the target audience adds value to his feedback. Both Mila and Chris completed their reviews remotely in home offices. I was unable to observe them and asked them to record the following:

For each step, please record your **start and stop times** – *or* – total number of minutes; and any **problems**, **questions**, **or issues** that arise as you go through the materials. After finishing the lesson, please record your **final thoughts and comments** regarding the lesson's clarity, flow, interest, and effectiveness.

Small Group Evaluation Summary

Steps	Mila's Observations and Feedback ****************** Chris's Observations and Feedback	My Response
1. Introductory Video	5:39PM - 5:45PMAll the fictional examples are great choices, although you might want to consider looking for more recent options as well, ones that your audience is guaranteed to know (possibly from the MCU or something similar) ************************************	Mila is absolutely right. She's calling me out not for being a nerd, but for being a millennial nerd! I should investigate more recent TV or movie clips to include in the intro video and closing video. (Added recommendation to my design notes.)
2. Content Video	5:48PM - 6:00 PMDefinitely include transitions of some kind between segments, the first one at 1:42 was very jarring. Also, consider recreating the first segment as a walk and	While I already planned to smooth out transitions in the video production, Mila had some great ideas to contribute to the video design. (Added her

talk (like through a lab or workspace, if possible), it will engage the audience a bit more without the need for so many added visuals. Regardless, the first segment felt very dry, and the added visuals helped, but not by a huge margin. When captions are added, make sure to replace the captions on the segments that already have them, so that they are consistent for all the segments (otherwise, it might be distracting).

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11 min to watch the video and provide comments The videos did help a lot to understand what BLUF is and why its important adding the closed captions and and transitions would be helpful another thing if its not to much of a pain to add or edit would be to edit the sound so that the volume level is the same throughout all segments the narration I had to turn up my earbud volume then it was to loud when cut back to the youtube videos but all the videos were good content wise along with the narration

recommendations to my design notes.)

Chris's recommendations will be addressed in the video production.

3. Comprehension Check

6:00PM - 6:03PM

2.5 min the quiz was effective in checking comprehension and

	understanding of the materials presented so far	
4. Content Slides	7:22Pm - 7:24PM _I would recommend either aligning the text to fit the lines on the background or changing the background. When the lines and text overlap, it because a little bit more difficult to read. ************************ 3.5 min I think these are good slides and provide a good example of using BLUF no changes needed	Content slides are a draft. Final product will either have pop-up, click-to-reveal text or will otherwise adjust the formatting to be more readable.
5. Comprehension Check	7:26PM - 7:27Pm _I was able to answer these questions by just reading the first sentence of each paragraph, which is likely the point, but I wanted to provide all the info for how I did the quiz ************************************	Mila's response might indicate the comprehension check is too easy. Comparing her response to the other reviewers', the others seemed to perceive this step as "straightforward" rather than easy in a way that could be construed as too fluffy or condescending.
6. Writing Assignment	7:29PM - 7:33_ _The assignment overall is straightforward, and I don't believe it would take too long to write this paragraph, probably 15 minutes at most (if I knew	I chose not to mark the cause and solution as Mila recommended, because identifying the most important information to include

anything about engineering, likely a little longer since I don't). Since the point of the assignment is to test writing skills, not engineering skills, you could somehow mark what the cause and solution were in the bulleted list provided. This might only be coming to mind for me, as I have had no engineering training and did not immediately identify those within the bulleted list.

Something that could be included for more clarity or to more establish this as an introductory assignment is including an estimate for how many sentences the paragraph should be (i.e., 5 sentences in total: 1 sentence to identify the cause, 1-2 for recommended solutions, and 1-2 for other key details). I would say this is likely unnecessary, as these are young adults and should hopefully be able to put together a decent-sized paragraph.

Estimated would take 20 - 30 min total to complete the assignment

The assignment was really clear in the requirements and the rubric and the complexity or details were good too and give the student enough to complete it it would probably take me between 20 and 30 minutes to go over the assignment read the

is part of the assessment. The other reviewers, including SME and engineer, did not express confusion or make recommendations to revise this step.

I am choosing not to add instructions regarding desired paragraph length, per Mila's recommendation. Learners need to include the necessary content in their introductions and leave out fluff. They should be focused on clear and concise communication: counting sentences is counter-productive. Mila's concern for paragraph length results from her academic - rather than workplace perspective.

Chris's time estimate for the writing seems high. However – I was Chris's ELA teacher for his 3rd-6th grade years, and while he was a very advanced reader, he was always slower and more cautious about writing anything "important." I believe that Mila would take

	rubric and actually write and provide a sanity check on the opening paragraph	under 15 minutes to complete the writing assignment, and I think I also believe that Chris might take half an hour before he would be willing to turn it in, even though it's a single paragraph. While the course is self-paced and the learners could vary widely in confidence, I might want to reconsider the overall time estimation for the average learner to complete all steps.
7. Content Handout	7:46PM - 7:47PM *******************************	
8. Extending the Lesson	7:49PM - 7:52PM ************************** 4 min The outline quiz provided a good way to show how to set up a report and the hints helped to explain why the correct answer was the righ choice and why the others were wrong without giving away what to choose	
9. Closure Video	7:52PM - 7:5	

4 min

That would be a good way to wrap up the lesson it goes over the important topics and what was covered/learned and the ending with the same video would show the results of providing the BLUFF format and remind the students of a situation of it bein utilized and working well

_Overall, really good!

(Reviewer's Final Thoughts and Comments)

I appreciate the immediate feedback from the Google Forms, and it doesn't feel like there are too many questions all asking the same thing. The materials, such as the Step 7 handout, are things that one could very easily hold onto and use as reference material in the future, which is a nice bonus. A formatting note, in the final version, I would make sure that each step is not split onto different pages. Having more than one step on a page is fine, but make sure a step is not on more than one page. Each step doesn't take more than a few minutes each time. but it doesn't feel like it piles on too quickly. Each step is easily

digestible, and it is easy to take

a pause (or be interrupted) and

continue where you left off.

Mila's total time falls just under 40 minutes. She did not actually complete the writing assignment, but she included the time for writing her feedback. That leads me to conclude the target audience should be able to complete the lesson comfortably in one sitting. Mila's last recommendation regards formatting of the finalized lesson, which naturally will be a focus of later production.

Chris spent 40 minutes, as well, not including his estimate for the writing assignment and including the time he took to write feedback. Due to his more

I liked the lesson and I think its helpful to provide the clips from movies or tv shows to show how it works and when itd be useful and why. It is easy to follow and flows well from all the steps and the order of them. When I was in college we did have to do a technical writing course but it was based off a textbook only and was pretty boring and slow. I think this way would be quick and interesting with the videos and assignments are a lot more interactive and engaging than just reading about in a textbook what this is and why its important to use this format in reports and papers to your supervisor/manager/clients. It was effective in teaching and making the process clear. I think it would be good adding all the design notes or recommendations you already have planned on adding throughout the lesson. The only thing I can think of to add to end step would be like a clip from a show or movie or like a little comic or something showing something bad from not getting to the point like a funny comparison between using BLUFF techniques vs not. But I think this lesson was great and doesn't need much improvement overall

cautious and less confident writing, I think he would end up spending 10-15 longer on the lesson than Mila if he were to write the assignment instead of feedback. Rather than a 30-minute lesson, this may be closer to 40-55 minutes to complete all steps, depending on learner confidence. Before completing production, I should (1) consider whether to change the estimated time for the lesson in the published materials, (2) consider whether to shorten the lesson by cutting the extension activity near the end, and (3) consider whether to develop a second lesson that expands on the extension activity to design instruction around organizing the body of the report following the BLUF introduction.

(Added Chris's suggestion for a humorous nonexample to the design notes.)

Synopsis. Both of my small group learners reported enjoying the lesson and provided valuable feedback. They did not encounter any difficulties with content flow or clarity. Both were bothered by the demo video being in draft form and wanted a more polished experience – which I understand! They offered a few interesting design ideas for the videos beyond the normal clean-up that will happen in production. Both reviewers liked the Google Form quizzes. (Quiz scores from all four reviewers were 90%-100%.) Neither attempted the writing assignment, but they read the instructions carefully and estimated the time for completion. Their estimated time varies by 15 minutes and causes me to wonder if I should either modify the lesson time estimate or develop a second lesson at a later date. Mila had concerns about the structure of the writing assignment, but I noted that she is coming from a high school rather than a workplace perspective. Chris liked the structure of the writing assignment, and as my SME and one-to-one reviewers approved as well, I'm inclined to leave it as-is. Chris believes the lesson is clear, engaging, and effective, especially compared to learning technical writing from a textbook as he did in college. As Chris is the reviewer closest to my target audience, I was pleased to hear his approval. Mila appreciated the overall flow and structure of the lesson, commenting that the steps were easily digestible and did not feel time-consuming. She paused in the middle of the lesson for dinner and had no difficulty or confusion picking up where she had left off. Based on the small group feedback, I am not revising the drafted lesson materials, but have made a few additions to my design notes and have some food for thought when I return to the lesson at a later date to complete production.

Revised Lesson Materials

While the drafted student-facing materials remain unaltered after considering feedback from my four reviewers, I have added their recommendations to my design notes, with the additions highlighted in blue below.

First Draft Materials

Lesson Steps 1-9 included.

Student-facing materials are highlighted in yellow.

Step 1: Introductory Video

Storyboards/ Design Notes:

- Video duration approx. two minutes.
- Begin with approx. three brief clips from TV shows or movies in which an over-explaining character (such as a scientist or engineer) is cut off by another character (such as superior officer or executive) who wants the bottom line. Examples: (1) A Star Trek captain interrupting a long-winded explanation from an officer, such as Picard/Data or Sisko/O'Brien; (2) General Hammond or Jack O'Neill in Stargate SG-1 interrupting someone and asking for the bottom line; (3) Weir or Sheppard in Stargate Atlantis telling McKay to get to the point. There are many other examples across genres, but sci fi examples will work well as a lead in for our topic. *Per Mila: consider using more recent clips, perhaps from MCU.* Editing the clips together in quick succession will begin the lesson with a humorous attention-getter while inviting learners to notice the pattern.
- Transition from the clips to an in-house talking head or an animated figure with voice-over. Add motion text and graphics to hold the viewers' attention.

Narration:

"Hey, what's the deal? Why are these smart characters always getting interrupted mid-explanation? For dramatic effect, sure, but also because decisions have to be made, and the people *making* the decisions want to know the bottom line. Yeah, yeah, the scientist-types went through a whole process to arrive at their recommendations, but the decision-makers are often under too much pressure for the details and want their colleagues to get to the point right away.

"While the clips were from fictional shows, the same principle holds true in the workplace. As an engineer, *you* might relate to the scientist characters who were being prompted for the bottom line.

"Today you're going to learn how to organize your report-writing in the style that supervisors and project managers want to see from the engineers on their teams.

"Is this really necessary? You're already writing reports on a regular basis, and before you were hired, you did your fair share of academic writing. You *know* you're good at explaining your process logically, step by step, with plenty of detail. But believe it or not, that's *not* what your manager wants. Fortunately, it's easy to make the shift to the writing style they DO want... Easy to impress them not *only* with your problem-solving process, but with your professionalism and communication skills, every time.

"In the next 30 minutes, you'll learn how to write a report introduction in the style known as *Bottom Line Up Front*. The right kind of opening will set the tone for the body of the report, and the rest is just follow-through.

"Ready?"

Step 2: Content Video

Demo video (4.5 minutes) – Click here to watch.

Key information communicated in the video:

- BLUF is for individuals who are thorough, detailed, have a lot of information to share, highly analytical, inquisitive, curious – and they have a tendency or need to share all of that information when communicating with an audience or executive. Oversharing can lose your audience or risk talking over their heads.
- BLUF allows you to quickly get the attention of a busy executive.
- Put your action statement, your premise, your answer right up front, supported by a couple of ideas, and indicate that you have more details if needed.
- BLUF originated as a military communications principle designed to enforce speed and clarity in delivering reports and emails.
- BLUF goes by other names, including top-down communication and the pyramid principle.
- BLUF is "a style of communication that prioritizes results and outcomes over the process and the steps you took to get there."
- BLUF features prominently a "what" and "so what."
- Employers have consistently rated effective communication as the #1 soft skill they look for in their employees.
- When a colleague provides you with the exact information you need with just enough background to act upon, and leaves out the fluff, it shows that they are respectful of your time.

Design Notes:

- The excerpted YouTube videos and Wikipedia article screenshots are credited in the References section at the end of this document. Use these YouTube excerpts in the final product if we can obtain permission; otherwise we'll need to draft replacement segments with in-house talking heads discussing similar information.
- Mila's suggestion: Consider recreating the first segment as a walk and talk (like through a lab or workspace, if possible), it will engage the audience a bit more without the need for so many added visuals. Regardless, the first segment felt very dry, and the added visuals helped, but not by a huge margin.
- Recommend adding closed captions. Mila's recommendation: When captions
 are added, make sure to replace the captions on the segments that already have
 them, so that they are consistent for all the segments (otherwise, it might be
 distracting).
- Add motion text where there are still slides in the demo.
- Add simple animation for the closing message.
- Improve the graphic overlays and transitions between segments.
- Replace my demo narration with a voice actor and edit/mix the audio.
- Background music not recommended if we're using the YouTube clips.

Step 3: Comprehension Check

Quiz – Click here to try it.

Answer Key:

1. BLUF is for individuals who are thorough, detailed, highly analytical, inquisitive – and they have a tendency or need to share a lot of information when communicating with an audience or executive. The **problem** with oversharing details, though, is that: (Select all that apply.)

Answer: Oversharing can lose your audience's attention. (and) Oversharing risks talking over their heads.

- 2. True or False: BLUF allows you to quickly get the attention of a busy executive. Answer: True
- 3. Which of the following report elements does NOT belong up front?

Answer: The background details of what led you to the solution			
4. In what sector did the Bottom Line Up Front strategy originate? Answer: Military			
5. BLUF originated as a communications principle designed to Answer: enforce speed and clarity in delivering reports and emails.			
6. BLUF also goes by other names, such as (Select all that apply.) Answer: Top-down communication (and) Pyramid principle			
7. True or False: BLUF is "a style of communication that prioritizes results and outcomes over the process and the steps you took to get there." Answer: True			
8. BLUF features prominently Answer: a "what" and "so what."			
9. Employers have consistently rated as the #1 soft skill they look for in their employees. Answer: effective communication			
10. When a colleague provides you with the exact information you need with just enough background to act upon, and leaves out the fluff, it shows that they are			
Answer: respectful of your time.			
Step 4: Content Slides			
Demo slides – Click here to view.			
 Make the presentation interactive with click-to-reveal pop up text. Pop up elements are shown as blue text boxes in the demo. 			

Step 5: Comprehension Check

Quiz - Click here to try it.

Answer Key:

Which of the following report openings for Scenario 1 best models the BLUF style?

Answer: The inconsistent sensor data was caused by electromagnetic interference from unshielded power cables running parallel to the sensor lines. Shielding the power cables and rerouting them perpendicular to sensor lines resolved the issue entirely. This report provides signal strength logs, interference zone mapping, and wiring layout diagrams to support the findings and proposed cable revisions.

Which of the following report openings for Scenario 2 best models the BLUF style?

Answer: The battery drain was caused by continuous GPS polling during idle mode. Disabling background location tracking reduced power usage by 38% during standby. This report includes battery profiling data, code snippets from the updated firmware, and test results comparing previous and current power consumption levels.

How did you identify the BLUF report opening for Scenario 2?

Answer: The BLUF opening clearly states GPS polling as the root cause and describes the fix immediately.

Step 6: Writing Assignment

Assignment - Click here to view.

Grading Rubric for Instructor or Scorer:

Criteria	Points	Description
1. Clear Statement of Root Cause	25%	States the design flaw (gusset geometry) as the cause of failure in the opening sentence.
2. Concise Description of the Solution	25%	Clearly identifies the revised gusset design as the fix and confirms it resolved the issue.

3. Inclusion of 3 Key Supporting Details	20%	Selects and briefly mentions 3 relevant elements to include later in the report (e.g., test results, CAD diagrams, analyst validation).
4. Organization & Style	15%	Paragraph uses the BLUF structure (conclusion first), is logically sequenced, and avoids unnecessary background or fluff.
5. Clarity, Grammar, and Mechanics	15%	Writing is free of grammar or punctuation errors; tone is professional and precise.

SAMPLE REPORT OPENING (Learner writing will vary.)

The premature deformation was caused by a design flaw in the gusset that created a stress concentration point. Revising the gusset with a thicker web and smoother transitions eliminated the issue, and the updated component passed all load tests under expected stress conditions. This report includes side-by-side stress plot comparisons, CAD diagrams of both designs, and validation notes from the structural analyst confirming the revised part meets performance standards.

Step 7: Content Handout

Handout/ digital flyer - Click here to view.

Step 8: Extending the Lesson

Google Form activity/ quiz – Click here to try it.

Answer Key:

Which of the alternative outlines above models the best organization for the body of the report following your BLUF opening?

Answer: Outline B

Step 9: Closure Video

Storyboards/ Design Notes:

- One minute closure video that mirrors the attention-getter video from Step 1.
- Bring the talking head or animated figure back in with similar motion text and graphics.

Narration:

"Excellent work! You've learned how to begin a report with the Bottom Line Up Front – clearly stating the solution to the problem, your recommendations moving forward, and a brief preview of the elements contained in the rest of the report.

"You also have a checklist for organizing the body of the report in a concise, summative way that delivers the important elements previewed in the introduction and avoids unnecessary fluff.

"Your audience will appreciate the clarity and your respect for their time. Your boss already knows you're a great problem-solver. It never hurts to be a top-notch communicator, too!"

- Try to end with a brief continuation of the same sci fi TV clips used in Step 1. Ideally, you want to repeat the commanding officer's line demanding the bottom line, continue through the scientist-type character delivering the bottom line, and the commanding officer thanking them, looking relieved, or immediately acting on the recommendation. You're going for symmetry, closure, and an amusing finish.
- Chris's recommendation: The only thing I can think of to add to end step would be like a clip from a show or movie or like a little comic or something showing something bad from not getting to the point like a funny comparison between using BLUFF techniques vs not

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