
Reading Primary Sources: Author, Purpose, and Context



Primary sources: direct, firsthand evidence created at the time of an event



Secondary sources: interpretations or analyses created after the fact



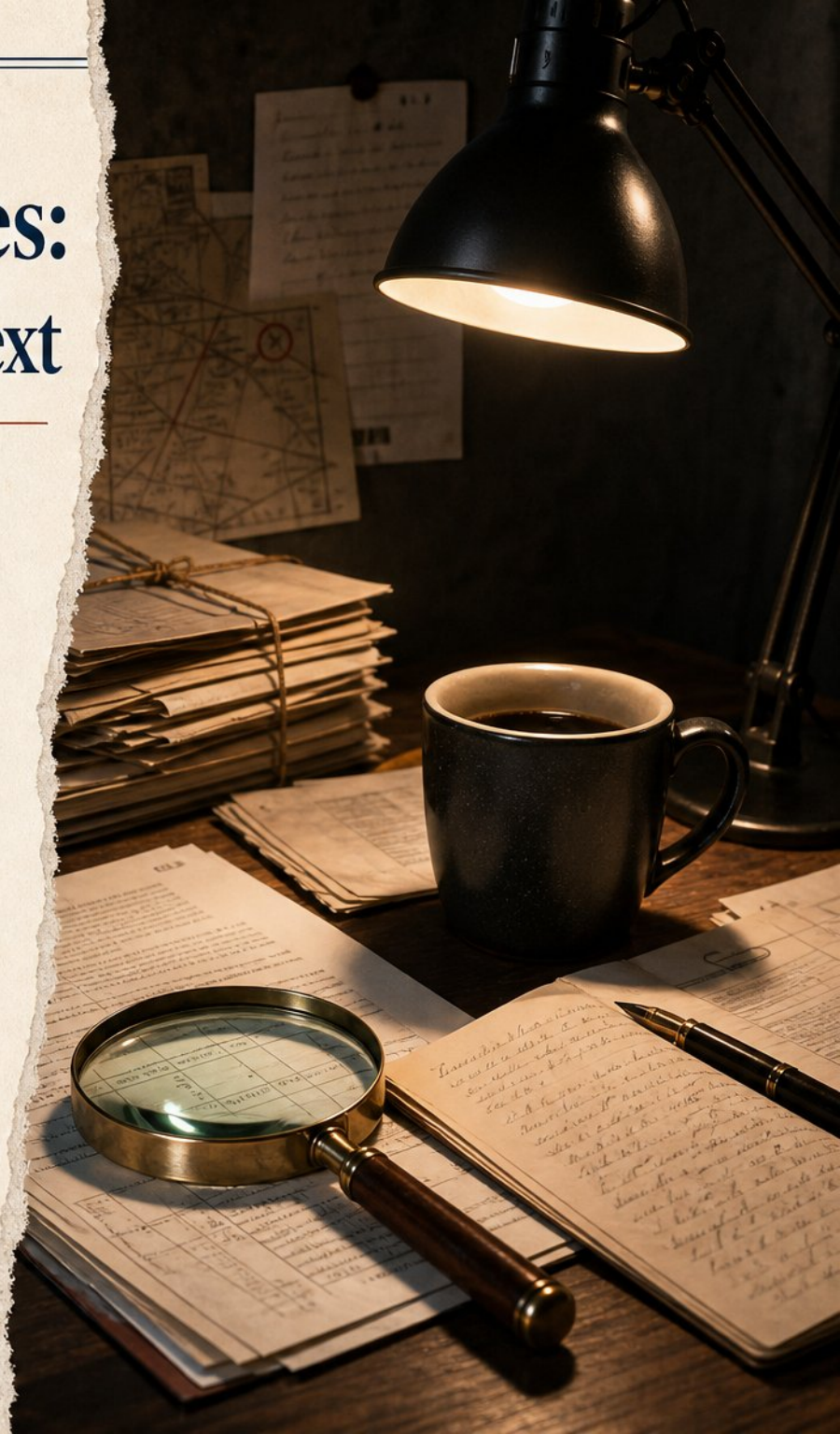
Critical reading reduces risk of financial misstatements and compliance failures



Five core dimensions: author, audience, purpose, timing, and relation to other evidence



Goal: build a questioning routine for everyday corporate documents



Primary vs. Secondary: Knowing the Difference



- **Primary sources:** direct, firsthand evidence created at the time of an event
- **Secondary sources:** interpretations or analyses created after the fact
- **Common business primary sources:** emails, meeting minutes, contracts, financial statements, internal reports, press releases, instant messages
- The distinction matters for assessing reliability, proximity to the decision point, and potential for distortion

Why Critical Reading Matters in the Corporate World

- Financial misstatements cost billions and destroy market trust
- Compliance failures expose firms to legal and regulatory penalties
- Strategic errors arise when decisions rely on flawed evidence
- Primary source analysis builds a firewall against organizational risk
- Vet reports, detect inconsistencies, and challenge groupthink early



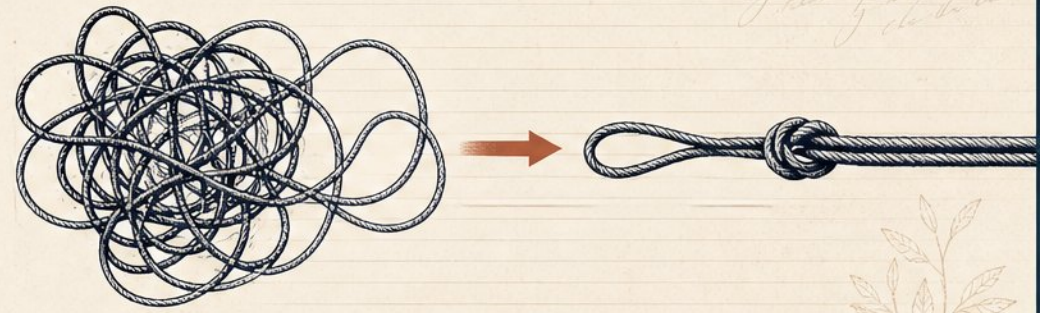
Dimension 1: Identifying the Author

- Determine who created the source: individual, team, or anonymous institution
- Evaluate author credentials, role, expertise, and potential conflicts of interest
- Recognize how authorship shapes what is included, omitted, and framed
- Apply ABCs (Authority, Bias, Credentials) and MAPit (Message, Author, Purpose) frameworks



Spotting Author Bias and Perspective

- ◆ Selective data, loaded language, and omitted viewpoints signal bias
- ◆ Department goals and personal incentives shape what is recorded
- ◆ ABCs framework: Authority, Bias, Credentials to evaluate the author
- ◆ MAPit strategy: scrutinize Message, Author, Purpose for slant



Dimension 2: Understanding Audience and Purpose

- Distinguish intended, secondary, and unintended audiences
- Identify explicit and implicit purposes: inform, persuade, record, instruct, or obscure
- Analyze how audience and purpose shape language, tone, formality, and evidence selection
- Apply the CRAAP test to categorize business document purposes



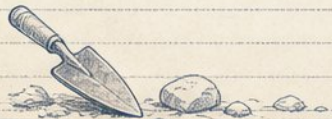
Audience and Purpose in Action: A Worked Example

- Analyze an anonymized internal memo: who was it written for, and why?
- Vocabulary, assumed knowledge, and call-to-action reveal the target reader
- Same facts would shift dramatically for a press release vs. board deck
- Purpose shapes tone, evidence selection, and level of detail



Dimension 3: Placing the Source in Time

- ◆ Establish the creation date: timing shapes interpretation
- ◆ Reconstruct immediate context before and after the document
- ◆ Watch for hindsight bias in retrospectives, recency bias in real-time docs
- ◆ Date undated sources using metadata, references, or event clues



THE
DOCUMENT

FUTURE
EVENTS

PAST
EVENTS

Events After the Document



Subsequent Developments



Later Interpretations



Immediate Context Before



Earlier Conditions



Events Before the Document



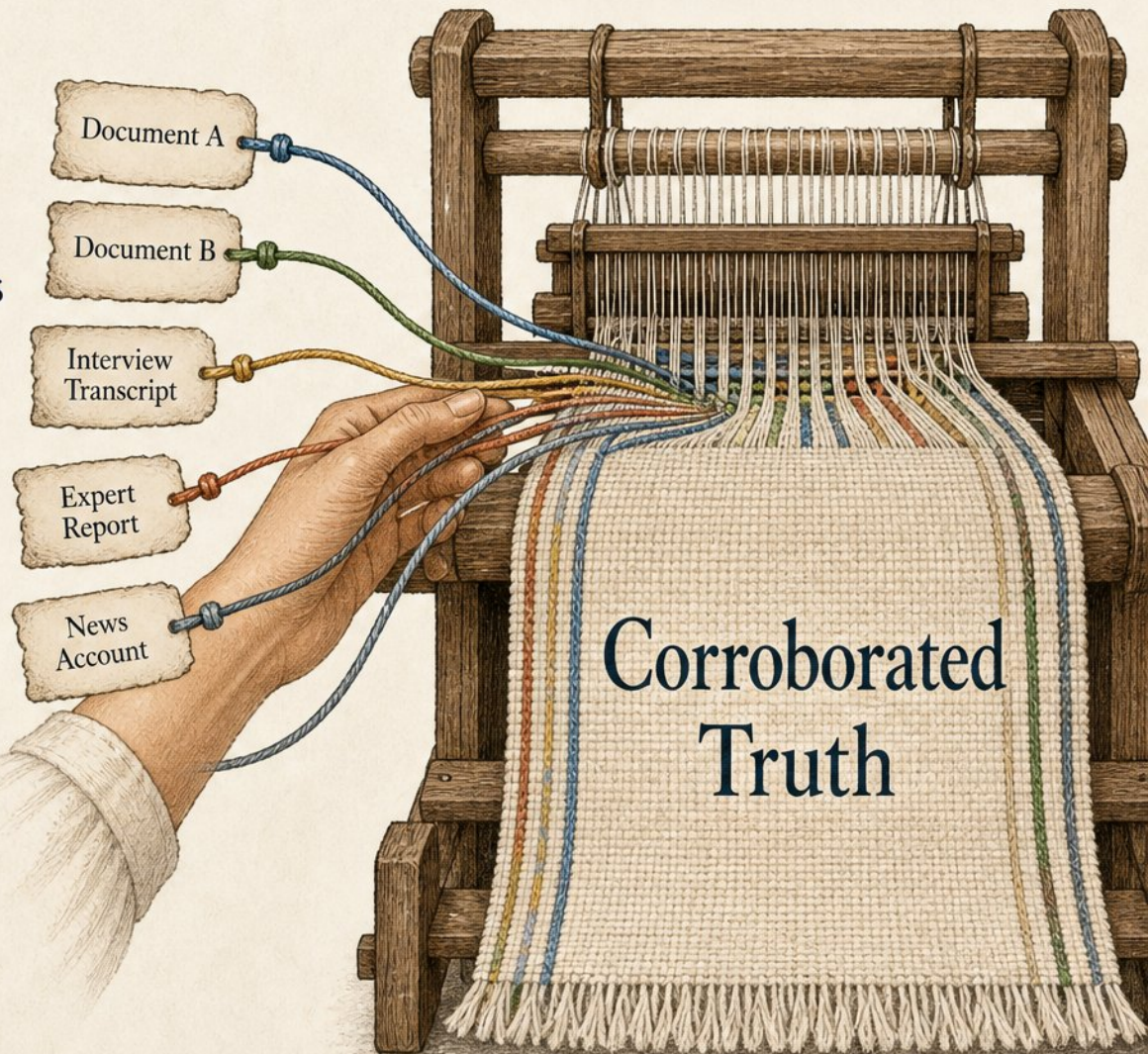
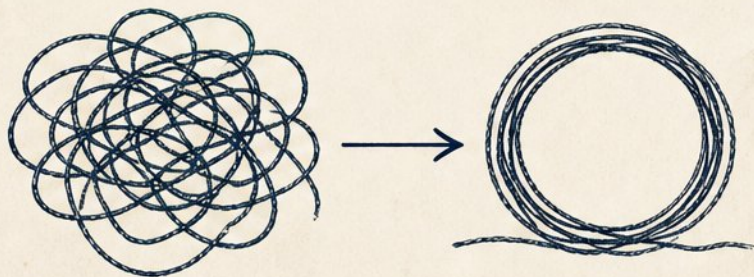
Temporal Traps and How to Avoid Them

- **Contemporaneous enthusiasm:** documents written in the heat of a moment may overstate confidence or urgency
- **Delayed reflection:** after-the-fact summaries can sanitize or rationalize past decisions
- **Knowing the date changes meaning:** a status update, risk assessment, or post-mortem
- **Reconstruct** what happened immediately before and after the document was created
- **Avoid hindsight bias** when reading retrospectively and recency bias in contemporaneous documents



Dimension 4: Connecting Sources to Other Evidence

- Corroborate: compare with other accounts for a complete picture
- Spot contradictions, silences, and missing perspectives across documents
- Apply SIFT: Stop, Investigate source, Find better coverage, Trace context
- Relying on a single source in isolation is a critical business risk



Triangulating the Truth:

A Cross-Referencing Case Study

- Three sources, three stories: email, dashboard, meeting minutes
- Step 1: Identify disagreements and missing data points
- Step 2: Investigate cause—timing, audience, or incentive gaps
- Step 3: Form a provisional conclusion; avoid anchoring on the first source
- Watch for confirmation and availability bias during cross-referencing



Dimension 5: Fact, Interpretation, and Misinformation

- ◆ Separate verifiable facts from opinion and speculation
- ◆ Spot cherry-picked data and manipulated visualizations
- ◆ Use contextual consistency analysis across documents
- ◆ Apply automated cross-referencing and source verification
- ◆ Build healthy skepticism through a questioning routine



The Complete Five-Dimension Questioning Routine

- Reusable checklist: Who? For whom? Why? When? What else is known?
- Apply end-to-end on an anonymized business email chain
- Avoid skipping dimensions—each reveals important context
- Verify all claims; never assume good faith without evidence
- Treat the checklist as an iterative practice, not a one-time check



Practice and Self-Assessment



- Analyze a fresh internal memo using the five-dimension routine



- Self-assess your analysis against the provided scoring rubric



- Discuss findings with a peer to uncover blind spots



- Identify one real document to analyze in your workflow this week



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