

The Perspective

Newsletter for the STC International Consulting &
Independent Contracting Special Interest Group

10 Steps to Create Your Personal Training Plan, Part 2

by Rob Houser

This article is a continuation from the Spring issue of The Independent Perspective. In Part 1, the author showed us how to determine our objectives with steps 1 through 5, and in Part 2, he continues the discussion on how we can then start to implement our plan with steps 6 through 10.

Step 6: Investigate ways to achieve your learning objectives

Once you know what you need to learn this year, you need to investigate all of the options. It helps if you (or your department) save all the advertisements and catalogs for training that you receive in the mail throughout the year. Check with local and national workshops and training courses, local colleges, and continuing education programs. Surf the Web for classroom training, computer-based training (CBT), and even Internet-based courses. Many large corporations offer skills training for their associates. You can also reap many training rewards by attending a conference such as the STC annual conference or conferences held by the Institute of Electrical and Electronics Engineers or the Special Interest Group for Documentation of the Association for Computing Machinery. These organizations offer workshops before and after the main conference. Finally, don't overlook the low-cost option of books.

Any combination of these solutions can help you learn the tools and skills you want to acquire. Your final selections will depend largely on your training budget, schedule, and personal learning style. For instance, some people can purchase one or two books about Active X programming and teach themselves a little every week; others require more structured training that gets them out of the office for a few days while they learn.

Figure 3 on page 13 shows options for different learning objectives.

Step 7: Choose the most effective training solutions

After you have listed your training options, choose the best way to develop each ability. Be aware of the cost and alternatives, but don't sacrifice quality completely for cost. Try to make good business decisions. What options will result in the greatest return on the investment? Even if your company or department has an "unlimited" budget for training (which is unlikely), you should show your manager that you are trying to use the company's money wisely.

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Another Short Summer...

by Kelly Burch

Well, here we are again—looking back with regret at another summer that just seemed too short, but looking forward with anticipation towards another fall that is full of promise and activity. It seems hard to believe that the summer flew by so quickly and that the days are already growing shorter, but Labor Day is right around the corner, bringing with it the beginning of the next year's activities for the STC.

But, we're not just standing on the cusp of a new year in the STC, we're standing on the cusp of the next millennium and the possibilities for technical communication seem boundless. With this in mind, it seems like a perfect time to plan what we want to accomplish in 1999-2000 and beyond. Hopefully, the articles in this issue will get you started on your own plans.

Thomas Barker, our illustrious leader, has plans for the CICSIG and he shares them with us in his column "From the Manager's Front." He has some great ideas on how we can make the CICSIG

a more visible part of the STC—find out what we can do to contribute to this effort. Also falling in line with our theme of planning and preparation, be sure to check out Part 2 of Rob Houser's excellent series, "10 Steps to Create Your Personal Training Plan." It is a valuable article, since it is so easy to let your training lapse after becoming a consultant or contractor.

Continuing on the path of planning and preparation, readers who are still "sitting on the fence" about contracting shouldn't miss the first of Laura Vasquez's series of articles about the decision to make your own "declaration of independence." In her article "Making the Leap," Laura gives us her personal perspective on what it is like to finally jump into the independent world—I'm sure you'll find her experiences valuable.

But wait, there's more... We have a lot of good content this month, so take it all in, enjoy, and get ready for one of your best years ever!

Until next time... ❖

Letter to the Editor

In "Dealing with the Dark Side of the Internet" (*The Independent Perspective*, Spring 1999), Tom Lenzo defines Internet pornography as "anything displayed on the computer that can be offensive to others." This is an indefensible misuse of the word "pornography." The ordinary and legal definition of pornography is verbal or graphic depictions of sexual matters with the intent to titillate. Thus, while *Hustler* is pornographic, Rubens' paintings and medical textbooks are not. Offensive material is simply that, offensive material, and the determination of whether it is offensive is purely subjective. The proposed standard, "can be offensive to others," covers everything with more information content than the weather report. For instance, I find every word that comes out of the mouths of Tom DeLay and Dick Armey offensive, but few people think to block <http://www.house.gov>. That said, I agree that employers have the right to control their employees' Internet access and e-mail, and Lenzo reviewed the topic well.

---Jim Casey, Galveston, Texas

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LETTERS TO THE EDITOR

We encourage you to send comments, suggestions, and opinions regarding *The Independent Perspective* or the CICSIG to the editor at kburch@dallas.net.

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SUBMISSION

Articles and news items should be submitted to the editor by the first of the month prior to the month of publication. Please submit files in either text or Word format to Kelly Burch at kburch@dallas.net.

Directions for the CICSIG in 1999-2000

by Dr. Thomas Barker

When I attended the annual SIG meeting at this year's 47th STC Conference, I felt a special pride in the work that CICSIG members had done during the year. In fact, I could boast about a number of accomplishments of our members:

- four excellent newsletters by Kelly Burch, Jo Byrd, and Margaret Doss
- the remake of the CICSIG Web site by Kelly Burch
- three new chapters added to the Getting Started in Contracting and Independent Contracting online book by Michael P. Belfiore, Linda Gallagher, and Shannon McCready
- continued activity on the CICSIG-L listserv by various members
- a project to create a national consultant/client database sponsored and maintained by the CICSIG by Mike Coffman and Michael Langston
- a project to put the Annual CICSIG Survey online by Thomas Barker

Indeed, our SIG has been active and made a significant contribution to the Society and the profession of independents as a whole. The involvement of CICSIG members at the conference was significant: over 60 persons attended the SIG luncheon and sat at CICSIG tables, and 10 persons presented at the CICSIG progression (including: Karen Steele, Judy Glick-Smith, Cheri Taylor, Mark Hanigan, Doug Florzak, Gem Smith, Corey Wick and others). We have had a year of accomplishment and hard work, but I wonder...how much does anyone know about our work? If you got within earshot of me during the networking

luncheon, you heard about the newsletter and our projects. If you attended the CICSIG meeting, you heard about our plans for sessions dealing with independent work at next year's conference in Orlando. But when it came time to hand out the plaques, where were we? Silence...!

To gain the recognition we need for our SIG—which translates into more members, greater Society support, more active members, and increased support for your independent work—we need to enter competitions. As you know, the mission of the STC itself is to support and promote the profession: as a SIG, our mission is the same. Support means a lot of things: sharing information, addressing issues facing independents,

The point is not really to gain recognition for the CICSIG, but to promote the profession of independent contracting and consulting by technical communicators.

and providing resources. But above all it means recognizing the good work of SIG members and of the potential for our SIG—the largest in the Society—to directly benefit the work of its members. The point is not really to gain recognition for the CICSIG, but to promote the profession of independent contracting and consulting by technical communicators.

This year we can increase the visibility of the CICSIG in a number of ways, but first through entering STC Public

Relations Program competitions and STC Newsletter competitions.

CICSIG Public Relations Program

Public relations, I learned at the conference, means that we need a Public Relations Committee and a Public Relations Manager. I noticed that a number of CICSIG members list “public relations” as one of their specialties, so any one of you who do that work might like to take on the job. Here are the duties of the Public Relations Manager:

- Devise a public relations plan for the CICSIG.
- Communicate with the CICSIG management team to coordinate the implementation of the plan.
- Collect public relations material to document the PR effort.
- Prepare a public relations packet to submit to STC for the 1999-2000 competition.

All we need now is a PR Committee Manager for the CICSIG. Any person wishing to volunteer for the position should send an e-mail to me at tbarker@ttu.edu, or call me at 806-742-2522.

Newsletter Competitions

The newsletter competition should be very easy to win because we already have a fabulous newsletter, publish more than the required number of newsletters, and have an outstanding staff of writers who can showcase their talents on the pages of *The Independent Perspective*.

Continued on page 12

Making the Leap

by Laura Vasquez

In October 1998 I presented a workshop at the Region 8 Conference. I was dismayed after my session that I had not asked workshop participants for their contact information. I had wanted to send them a copy of the presentation by e-mail or “snail mail.” The CD-ROM of the conference proceedings did not appear until the end of May, by which time I had decided to submit my presentation for publication here. This series of articles is composed mainly of my workshop presentation, which I have expanded and revised.

Objectives

The objectives of this series are to inform readers of the following:

- how and why (or why not) to become an independent consultant and contractor
- what to expect the first year as an independent consultant and contractor

Introduction

Being an independent consultant and contractor has many benefits and many drawbacks. The number in each category depends on your reasons for being independent as well as on your unique circumstances. This series will discuss my own reasons for becoming an independent consultant and contractor and my experiences in pursuing this goal over the past few years. I hope that it will contain much useful information for those interested in venturing out on their own and for those just starting out as independents.

Background

As a student member of STC, I met several successful independent consultants and contractors who were outstanding mentors. (In fact, one of

them, Associate Fellow Brian McCaleb, continues to be my mentor.) I thought that some day I would like to be independent as well. Before the Internet and e-mail were buzzwords, my dream was to be able to work at home and telecommute. I would be able to maintain my professional skills, continue with volunteer activities and hobbies, and still be in close contact with my family.

Now I have a B.A. in English Literature from the University of California, Riverside, and a Certificate in Technical and Professional Writing from California State University, Long Beach. I am also married, with two sons who are 4 years old and 16 months old.

I learned a lot through two very intensive, albeit brief (about 1½ years each), jobs with the Cardiology Department at Harbor-UCLA Medical Center and with Biomedical Business International (a medical technology publishing company). I also gained extensive experience through a variety of volunteer activities and leadership positions, including in STC. Therefore, when I was laid off the second time—when I was five months pregnant with my first child—I decided that it was time to begin making the dream a reality.

I began researching in earnest to learn what was required and what was most beneficial to be an independent consultant and contractor. I interviewed many chapter and CIC SIG (then, PIC) members about their experiences and what they wished they had known and done. I investigated computer capabilities and tried to project what I would need for various projects. In addition, I reviewed my skills base and

interests to determine in which areas or on what types of documentation I would like to work.

Realities and Perks

It has not been entirely as I had hoped it would be. For example, my older son gave up his nap the month before my younger son was born, so I did not have much uninterrupted work time during the day. On one project, for example, I had to force myself to get up between 5:00 a.m. and 6:00 a.m. in order to work at least two hours before the children awoke. Sometimes I was too exhausted to do that, so I had to make up for it during the day. I also worked from about 8:00 p.m. to 11:30 p.m. (or later) after my older son went to bed; my husband took care of the baby.

In many ways contracting has actually been better than I had anticipated. Some of the perks that I had envisioned and am realizing include the ability of a contractor and consultant to:

- Set your own hours
- Work at home
- Maintain and improve your skills
- Deduct many of your professional expenses, such as:
 - STC dues, as well as meeting and conference fees
 - Business- and STC-related travel
 - Equipment and office supplies

I have truly been blessed to be able to realize my dream.

Laura is a Senior Member of the Orange County Chapter. She has freelanced since 1993 and officially started her company, Vasquez Communications Consulting, in 1998. ❖

Take Command of Your Future as an International Communication Consultant

by Magda S. Sourour

Walt Disney's mission was to make the world smile. It still does. Nevertheless, he approached 302 banks before he could reach his dream. Persistence and dedication, as well as focusing your mind and soul on a task while performing it, will pave the way to your aspirations.

In an attempt to challenge your international savoir-faire, keep you motivated and focused as an International Communication Consultant, and pique your curiosity, this column will cover:

- useful tips and inciting innuendoes
- episodes, news, and helpful suggestions with an international flavor
- inspirational topics and reading recommendations

A Case of Enormous Tenacity

Abraham Lincoln became president at 56.

At 32, he was defeated in a legislative race, failed in business, had a nervous breakdown after the loss of a loved one, and was institutionalized. He still went back to politics.

He lost several elections, tried to become Vice President and failed again. However, he kept following his ideas and new paradigms until the age of 56, when he decided to run for office one more time.

If you have qualifications, potential, leadership and passion you will succeed. But if you are passionate about your profession, your mission, and your vision, you have already succeeded.

International Piquancy

'*Okonomiyake anyone?*' suggested a prospect, before his final decision on signing a Technical Writing contract.

[Translation: *Japanese Pizza anyone?*]

'*Koko Ni signschte kudasai*' was the unexpected response he received, from the International Consultant.

[Translation: *'would you sign here please?'*]

He did sign there, with a broad smile and said:

'*Origato, hontoni tanoshikatta desu.*'

[Translation: *'Thank you. It was really pleasant.'*]

Gaining insight about different cultures and crossing the language barrier will unquestionably create better opportunities for the International Communication Consultant.

Cosmopolitanism

Japan is restructuring its current economic situation, and many of its small and large companies are looking for new technologies that specifically address marketing opportunities.

Information and Communication is one of the sectors that Global Venture Forum (GVF) is focusing on this year. An excellent place to meet innovative foreign and domestic prospects is in Osaka, Japan October 21-22, 1999 at GVF.

For those planning a European plunge soon, Languages and Education—the first European showcase of its genre—is expected to attract 300,000 visitors, both professional and general public. It is being held in Paris from

November 24-28, 1999. This type of event should generate excellent business and networking opportunities.

Pointers

If interested in mastering at least one foreign language, consider the following:

- Sign up in a language course through a long distance education program specifically tailored to your needs. An abundance of 'fast tracks' or regular courses are available worldwide. Search the Internet, scrutinize newspapers and specialty magazine, you will inevitably find the appropriate one if
- Your target is self-tutoring, purchase or borrow from your local public library the apropos audio assets.
- You attend a foreign language night course in a high school, college or university

To enrich your perception on different cultures:

- Interact directly with diversity by joining a foreign specialized association, within the area of your expertise or personal interest (an excellent link would be the STC, via a chapter located in a different country)
- Do not hesitate to request free information packages, available through several embassies and consulates

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The Yin and the Yang

by *Bev Bruns*

I've been working in a marketing department in corporate America (CA) for the past eleven years and find myself at a point where I'm too lazy to get off my derriere and get out into the freelance world again. Having said that, I am also constantly aware of the need to be ready to go at any minute because the words "security" and "corporate America" are mutually exclusive. With the merging, downsizing, stock market lurches, and layoffs lurking around every corporate corner, CA is a dangerous place to work and woe betide the individual who forgets that.

About 15 years ago I found myself laid off from my position in another—now defunct—corporate organization. At that time, I had a low-rent apartment, a small bank account, and a cat. I had over a month to decide whether I wanted to join the corporate accounting group where I was offered a "we need to keep some women" job. I didn't join and drifted layoff-wards without any planning or marketing ideas. Then I sat home for a week or two during which time I cried briefly at one point and then took stock.

The first year of independent employment was one of grinding work hunting—using agencies and contacts. My salary was abominable. But I survived and did so without any marketing plans or skills. That gave me courage. The second year I doubled my salary and began to enjoy myself, taking art courses in my free time and actually enjoying doing chores during the day when my compatriots were all stuck in offices. The third year I got a gig with a big local corporation and was offered one of those "permanent you're not our

employee but the agency's" jobs with them. I had the audacity to express unhappiness at not being asked to be a direct employee and gave the job a pass. It took me another year and a half to get back to my corporate salary. At that point I was turning down long-term projects because I didn't want to subcontract and have someone else dependent on my job-finding skills. After four and a half years of being self-employed, I returned to corporate life.

The point of this story is two-fold. First, it's hard not to survive in our business if you are competent. Second, it would have been much easier for me to achieve acceptable salary status in a much shorter time span if I had planned ahead and understood anything about how to market myself.

Multimedia Horizons

One of the benefits of working in a marketing department in a big corporation is that you get a very good understanding of how marketing works and what it takes. You get to learn MBA-speak and the latest MBA fads (paradigm shift, leaping the chasm, etc.). You learn about when to empower a team (i.e., any time you take on a project that looks like it will have a less than desirable outcome, make it a team project— "team" decisions mean "team" accountability for outcome). This type of information is important because it helps you know how to focus information when you are marketing yourself and your services as an independent contractor or for your independent company. And if you have been paying attention lately, it may have dawned on you that we are currently—right this moment in 1999—in the midst of what could

be one of the greatest job markets ever for technical communicators.

There is a vital place for us in the wonderful world of Marketing. Technical communicators bring attributes to the multimedia environment that almost no one else—not MBAs, not advertising folks—have. We understand publications software! We have actually USED IT! We know all about weaknesses of systems, the definition of proprietary software, and the difference between HTML and XML. We understand PDF publishing!

Add to that a touch of creativity and a flair for conceptual thinking (including "out of the box") and VOILA! You have just generated a full set of jobs for the creative technical communicator in business-to-business marketing and beyond. This is especially true if you are a technical communicator who can also write and edit to a variety of end-customers and effectively evaluate proposals, software recommendations, and the quality of writing, editing, and graphic design supplied by others.

Bad software decisions have cost corporate America more than anyone could probably ever guess. Very often the people making the decisions about publishing methods are third party managers who know about only one publishing system (the one used by their favorite vendor).

These folks have no idea that software used to produce an eight-page brochure is often totally inadequate for the 500-page company catalog. The end result is literally retyping large documents over and over again every year. The time and cost involved long-term can be staggering.

Add to this the need to create integrated multimedia documentation: i.e., hardcopy that sends customers to your Web site, Web sites that reference hardcopy materials, Web sites that interface with the sales and support forces, requirements for creation of multi-language documents and Web sites, interactive CDs and training materials (the list can get considerably longer), and you can begin to see a variety of new job possibilities—many of them ours if we can learn to effectively market ourselves and our profession.

Do the Marketing

There's a gold mine out there and our profession is positioned to benefit, but only if we recognize the opportunities and do the marketing. But to be successful, we will have to change from passive to positive and maybe even aggressive thinking. That means clearly communicating to management—in their own terms—where the communications business opportunities lie, including the financial benefits (both in time and money) of using appropriate production and publishing tools, the importance of keeping current with software, and the need for multimedia thinking and production. Very often this is an instructive process and you will have to demonstrate how a process or job will work and then quantify the value added. You may have to teach the printer how to publish using PDF files. You may have to do the slide presentations illuminating differences in products and enumerating financial and strategic benefits.

As communicators, if we can't figure out how to effectively define a job and its processes and tasks, then who can? Traditionally, we listen to others, accurately producing customer-focused materials for products and services. Identifying and defining new jobs is not much different. It does require creativity and justification, and that means bringing marketing skills to bear to "sell" your ideas. Multimedia editors. Multimedia writers. Multimedia localization experts. Multimedia graphic designers. The work is there. We have to quantify it and make it our own. It won't be easy. And sometimes people don't pay attention because they don't get it yet. So, whether you are carving out a job for yourself from a consultancy or from within a company, keep at it. Let's not let this multimedia opportunity get away.

Bev is a Marketing Specialist with the Chemical Analysis Group at Hewlett-Packard (soon to be the "Lucent II" company) in Wilmington, DE. She is a member and past president (1996-97, 97-98) of the Philly Metro Chapter. ❖

Moreover, when acquiring a new language and exploring a diverse culture, you need to:

- Use your natural skills by learning to listen all over again

Anticipation

The next column will include:

- how to overcome obstacles, conflicts, and setbacks when dealing internationally
- thinking with a global mind

Insightful Reading

Freeman Charles, *Egypt, Greece and Rome Civilizations of the ancient Mediterranean*. Oxford University Press Inc., New York 1996. The deep links between the cultures across the Mediterranean are revealed. The way in which these civilizations continue to be influential to this day is explored.

Mc Quain Jeffrey, *Power of Language*. Houghton Mifflin Company, Boston 1996. An essential guide to better writing and stronger speaking. Even experienced writers and editors will be tempted to adopt it. It could become an indispensable writing tool.

Gerzon Robert, *Finding Serenity in this Age of Anxiety*

Proficient in French, English, Italian, and Arabic, Magda S. Sourour is a technical support consultant with SINTRAC Information Technology Corp., a Canadian consulting firm. She can be reached by e-mail at info@sintrac.com. ❖

Would You Steal a Car to Get to Work?

by Thomas P. Lenzo

Recently, I had the following telephone conversation with a colleague:

Caller: I have a problem with (name of a software program) on my computer. I loaded it and it trashed my printer drivers. Then it asked for a DLL from a Windows 95 CD.

Me: *So what's the problem?*

Caller: I don't have a Windows 95 disk; I upgraded my operating system from a friend's Windows disks.

Me: *Did you call the software program's help desk?*

Caller: No. They would ask for a registration number and I was worried that they'd trace it to my client.

Me: *Did he give you the software?*

Caller: No.

Me: *How did you get the software?*

Caller: (silence)

The software and the operating system were pirated. (Definition: *software piracy* n. 1. The theft of a computer design or program. 2. Unauthorized distribution and use of a computer program. *Microsoft Press Computer Dictionary*, Third Edition.)

Unfortunately, I have had similar conversations with other colleagues, including several members of STC. "We observe the laws and regulations governing our professional activities in the workplace" (from the STC Ethical Guidelines for Technical Communications). I think that means we should do our jobs with tools we did not steal, and we should not accept that behavior from our clients.

Most of us would not walk into a store, take something off the shelves and stick it into a purse or pocket. But that is what you are doing when you "borrow" software, or load software on your hard drive that you did not buy. Why not steal the hardware too? Having the necessary software is a cost of doing business. You wouldn't like it if you wrote a document then found out that it was being copied and distributed for free, and you weren't getting any money.

Most of us would not walk into a store, take something off the shelves and stick it into a purse or pocket. But that is what you are doing when you "borrow" software, or load software on your hard drive that you did not buy.

Software is a tool that is delivered shrink-wrapped. It is protected by the laws of copyright, under the rules regarding literary works. That protection is in effect as soon as the software is put on the fixed medium (i.e., disk). Unfortunately, that tool is on a medium that is very easy to copy or pirate.

The dollars lost to piracy or spent chasing bootleg copies can be used by the software companies to further develop or support their products. Those piracy dollars are large amounts of money. In the United States, 28% of the software on business computers is pirated. The average corporate PC has

\$450 worth of stolen software on it. California firms were caught with \$1.3 million in pirated software in 1997.

In some foreign countries, piracy is much worse than in the United States, with bootleg rates approaching 100%. Revenue losses to the global software industry due to piracy were estimated at \$11 billion in 1998 according to the Software & Information Industry Association.

Software thefts aren't always from Microsoft-sized companies. The National Association of Software Publishers has 7,800 members: the average member has 27 employees, grosses \$3 million per year, and publishes only one software application. We consultants can identify with those small companies.

The software industry is serious about enforcing anti-piracy laws. Companies are responsible for knowing what software is on their PCs. Costs to companies when caught with pirated software can include civil damages up to \$100,000, criminal damages up to \$250,000, and up to five years in jail, as well as a bill for the software. A recent settlement with the Los Angeles Unified School District for software piracy cost the school district \$4.8 million.

So what can we do? As professionals, we can educate our clients regarding the problem and potential cost to them of software piracy. We can develop the policies, procedures and training necessary to prevent it. And we should set the example by not pirating software ourselves.

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Fixed or Hourly? — The Debate Goes On

by Ken Mauro

Some weeks ago, I was following a thread on the techw-r list about contractors working fixed-price versus hourly. The fixed-price approach was really taking a beating. Just about everyone seemed to prefer the idea of working hourly to protect against indecisive customers and all kinds of undesirable or unforeseen circumstances.

Someone on the list made a comment that particularly interested me: “Then assume that the project lead is indecisive, unclear, or ambivalent about where the project should go. On an hourly rate, there’s a cost to the contracting company for mid-stream direction shifts, gratuitous revision cycles, or ‘Oh, we meant ‘blah, blah and just assumed you knew that really was blah blah blah in *Our Jargon*.’ With a flat rate, the contractor must either deal with it or walk away—either way, it’s a potentially disastrous situation.”

This bothered me, since almost all of my work is done on a fixed-price basis. Further, I had just finished reading Peter Kent’s book *Making Money in Technical Writing*. Anyone who has read it knows he makes a very persuasive case for fixed-price contract work, and my own experience bears out his observations and recommendations.

Over the last 14 years, though, I have had to walk away—twice. Yes, disastrous is a pretty good word to describe the situation. However, I thought the “deal with it” part was too easily glossed over in the list discussion. I believe such situations can be managed successfully by first shrugging and then stopping all work. This might sound rash, but do I have another option? I think most customers soon figure out what’s going on, but if they don’t, it’s critical to have them understand that your work can only resume once the confusion is eliminated.

The situation can be a bit tricky, but it’s a matter of tact and a belief that it’s perfectly acceptable to protect one’s own interests. I admit that I get nervous when this happens, because I really don’t like any kind of confrontation, but it’s not hard to get motivated when the customer’s indecision or internal politics threatens my wallet. To my way of thinking, the customer can’t have it both ways. That is, enjoying the comfort of a fixed price while behaving as if there’s an hourly arrangement.

I’m not only working fixed price because I like to, but also because the customer often insists on it. Many companies simply won’t accept an estimate based on hourly rates. Second, the sad fact is (and Kent points this out) that many companies have gone through bad experiences with writers. They paid hourly rates, the writers racked up some salty bills, and in far too many cases the finished product was unsatisfactory or just plain unusable. Owners and managers at these companies are adamant about knowing in advance exactly what the project is going to cost them.

Most of my customers are machine builders. Their’s is a business where the custom nature of the finished product almost always dictates fixed quotes based on estimates of design/build time, materials, purchased components, shop labor, and outside services. Few buyers of custom machinery will accept a time and materials arrangement. Likewise, few builders would ever go T&M on an operating or service manual. To them, paying hourly is like giving the writer a license to steal. And even if the writer provides a “not to exceed” figure, that’s really just another way of quoting, since the final cost can always be expected to magically end up at that figure.

Kent validates my thinking: If I can work quickly and efficiently on a fixed fee, I’ll make a higher hourly rate than the one on which I based my quote in the first place. Moreover, I usually ask for one-third down, a nice chunk of money that affords a range of possibilities. (Tips on how to blow .. er, ... handle a down payment in another column.) Initially a new customer might balk, acting as if it’s some leap of faith to give money to a stranger before the first page has been produced. In truth, machine builders routinely ask for money down from their customers. The second payment (also one-third) comes at the submission of the first draft, and the final payment is due when the master copy and diskettes are turned over. By the way, I’ve had companies pay way late, but I’ve never had anyone try to stiff me for the final third.

Someone else among the tech-whirlers mentioned limiting the number of draft reviews. Very important. I provide three drafts, and I quote a high hourly rate for subsequent revisions to discourage endless editing.

It pays to explore all avenues and ask a lot of questions before you quote, and it may feel like you’re giving a prospective customer the third degree. On the other hand, some people really like that process. Many have never had to work with someone from the outside to get a manual written and published. They consider the experience an education.

Ken Mauro is an independent working in Chicago and the Midwest. He loves the word “virtual” and wishes more people would use it. His e-mail address is kmauro@ameritech.net. ❖

Getting Down to Business

by Lori Lathrop

The resources mentioned in this article will probably be more useful to those of you who are new to independent contracting. However, chances are, those of you who have years of experience under your belts may also benefit from reviewing the Web sites mentioned below.

SBA Resources

The Small Business Administration (SBA) Web site (<http://sbaonline.sba.gov/>) contains a wealth of information on freelancing and managing a small business. If you are relatively new to freelancing, be sure to review the SBA article "The Facts About Starting a Small Business" (<http://wbaonline.sba.gov/opc/pubs/co28.html>).

More Information on Small Business Management

The Mining Company has some of the best resources on starting and managing small businesses (<http://sbinformation.miningco.com/>).

Nolo Press has a Web page called "Small Business: Organization and Operations" (<http://www.nolo.com/ChunkSB/SB.index.html>), which has a wealth of helpful links. The section called "Home-Based Businesses" links to several topics from "Home-Based Businesses Aren't Legally Different From Other Businesses" to "Can I Claim a Tax Deduction for a Part-Time Home-Based Business?"

The Nolo Press page also contains "Small Business Tax Concerns" links including:

- Deductions Your Small Business Shouldn't Miss
- Writing Off Your Home Office

IRS Guidelines

Several Web sites contain the IRS's 20 factors used to determine whether you are a contractor or an employee. Every independent contractor in the U.S. should review the IRS Revenue Ruling 87-41, 1987-1 CB 296. For more information, see the Taxprophet Web page on independent contractor analysis (<http://www.taxprophet.com/apps/active2/indep-mm.html>). The most important questions are the last five:

16. Does the worker furnish significant tools, materials, and equipment?
17. Does the worker have a significant investment in facilities?
18. Can the worker realize a profit or loss as a result of his or her services?
19. Does the worker provide services for more than one firm at a time?
20. Does the worker make his or her services available to the general public?

More Tax Information

The Utah Association of CPA's Web site contains an excellent article called "Tax Breaks for Home-Based Business Owners" (<http://www.uacpa.org/smallbiz/homebus.htm>), which provides some helpful tips on the importance of distinguishing your business from a hobby, deducting automobile expenses and equipment costs, keeping track of meal and entertainment expenses, and qualifying for the home office deduction.

Freelance Editorial Association Resources

The Freelance Editorial Association's Web site contains some excellent (free) resources for freelancers. Their Code

of Fair Practice (<http://www.tiac.net/users/freelanc/Code.htm>) contains guidelines for client-freelancer relationships, descriptions of freelance work, guidelines for setting fees, guidelines for specifying project terms, guidelines for documenting agreements and resolving disputes, sample agreements, and a sample invoice.

By the way, the rates mentioned for writing in the Freelance Editorial Associations Fee and Scheduling Guidelines (<http://www.tiac.net/users/freelanc/fees.html>) show an estimated pace of 1-3 manuscript pages per hour and fees ranging from \$30 to \$100 per hour or \$45 to \$95 per book page. Also, in case you're wondering, the rates recommended for indexing show an estimated pace of work of 5-10 book pages per hour and fees ranging from \$25 to \$60 per hour or from \$3.50 to \$10 per indexable book page.

More Information on Setting Fees

Another excellent resource on how to set your fees is an article by Daniel P. Dern, "How to Set Prices for Your Services" (<http://www.dern.com/hw2price.html>). Versions of Dern's article have appeared in Home Office Computing (October 1991), in various newsletters, and probably some other places Dern doesn't even know about. The subtitle of his article is "A Step by Step Guide to Calculating What You Must—or CAN—Charge" and it is quite thorough.

Continued on page 15

Just When You Thought You Knew the Language

by Gail Bergan

I thought I would share with you how my work is going these days. I am surrounded (haunted might be a better word) by foreign languages. I must have “Glutton for punishment” written on my forehead. In the past year or so I have become a magnet for some tough editing projects—documents that were either translated from another language into English, or were written by someone with English as their second language. I thought I would share some snippets from these projects with you, since they are far enough in my past that I can finally laugh about them.

First there is “Japlish.” I occasionally subcontract from a client in Japan who runs an editorial service for Japanese scientists who wish to get their research published in English-language journals. The following comes from one of the papers I edited recently:

“The parallel arrangement like comb structure of clinoptilolite are observed at the pinched-in part of cast-off volcanic glass shards. And some clinoptilolites filled the vesicle are also observed... K-type clinoptilolite is formed although precursor volcanic glass did not abundant in K or pore water related to clinoptilolite formation did not rich in K such as remained geological record.”

Then there is “Spanglish”—software manuals from my South American client. It seems the software developer thought manuals were simply overhead (can you believe it?), so they hired a grad student to write them, getting them done as cheaply as possible. The original was written in Venezuelan Spanish, but was later translated into English by an Argentinean, to accommodate their English-speaking foreign offices who would also use the software. Could I clean them up? “You

mean, without even seeing the software?” I ask. “Yes, we don’t have the budget to pay you to rewrite them from scratch.” “OK, sure, no problem,” I say.

Subsequently, my days were filled trying to decipher about 250 pages filled with statements such as:

“Loading of data which is a prerequisite exclusive of production is analyzed, such as Production Time Framework, based on the Production Module Time Framework, which is detailed monthly in this case.”

“The program will ensure that the loaded starting date is less than the period starting date; except in the Fall-off type of periods where historical flowing rate data loading is allowed.”

Some of them even brought tears to my eyes:

“There are fields that allow saving the corresponding unit and this one has to be valid. No matter the unit the data is loaded with; this one will be saved in the base transformed to the corresponding unit according to each field by means of a mathematical calculus.”

Then I landed a client in France who wanted help with their Web site (“Frenglish”). They run a string of hotels throughout France and wanted to attract more American clientele, but their Web site read like this:

“A sophisticated space, a complete harmony between colours and antiques, will charm you. A warmly welcome, smile and courtesy, for successful stay. Standard room or Duplex, all rooms are spacious, bright and comfortable.... Bathroom made of marble from Portugal are an invitation to take care of yourself.... the flowered

courtyard isolates the guest rooms from the outside animation.... If your room doesn’t overlook the courtyard, then you may contemplate the patio planted of trees and flowers....”

Well, at least it’s not technical...

So just when I am at my most self-righteous, quite proud of my command of the English language, I decide to take a refresher course in French in preparation for my upcoming trip there this summer. Having only taken one year of French in high school, I decided to start over in the beginner’s class. Learning a foreign language as an adult has got to rank right up there with some of the most humiliating experiences a person can have. I am spending two evenings a week at the L’Alliance Française de Houston, struggling with sentences like: “Yes, I have one cat, but no dog,” and “I like to go to the cinema.” My instructor bursts out laughing when “I know my name” comes out in French as “I know my man.” My hearing is no better than my pronunciation. When translating an audio tape, and the guy says “J’adore la nature” (I love nature), instead I hear “J’ai un ordinateur” (I have a computer).

Taking this class has given me a new appreciation for those among us who are bilingual, and who would even *dare* write a technical document in English. I officially apologize to all of you for every bad thing I’ve ever said about your English-language skills. You are all geniuses, and have my utmost respect.

Gail Bergan is a contractor specializing in technical writing and editing, desktop publishing, and electronic publishing in the Houston area. Her Web site is <http://bergan.com>. ❖

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New Plans for 1999-2000

We have three ongoing projects for the next year, all designed to increase the visibility of the independents work and facilitate communication among independents. The following is a brief description of these projects.

CICSIG-Sponsored Contractors List

Michael Coffman and Mike Langston, CICSIG members, are putting together a list of contractors and clients to help them find each other. Still in the design stage, the list will be HTML-based (similar to those sponsored by some local CICSIGs) and will show consultants and clients. The National CICSIG Consultants Listing will have the following features:

- * Consultants and client companies are both listed
- * Consultant skill categories includes 7 types of environments
- * Consultants are listed in selected client company categories
- * Consultant's resume includes standard identification and Internet data
- * Consultant's resume uses "Mission Statement" format
- * Client company categories contain 8 types of basic industries
- * Client companies may use sign-in form to forward data for Web page
- * Client companies may send data by e-mail to be added to Web page

CICSIG Survey Online

As you know, the CICSIG sponsors a national "call for information" about the rates, work, and other aspects of independent work. In the past we have distributed the survey in paper format, but this year we are going to supplement that by putting the survey online. The online survey will allow us

to calculate data immediately, so that as soon as you take the survey you can easily see the results and where your data fits in with the results.

The online CICSIG survey uses EForm™ software to gather the responses and put them into a database form. I have prepared a sample of the survey at the following Internet address: <http://english.ttu.edu/gscic/survey99> for you to examine. I welcome your comments, but please get them to me as soon as you can because I hope to have the online survey up and running by the end of the summer.

Coordination with Local CICSIGs

A final project your CICSIG is working on is to visit the STC Chapter Web sites to find out which chapters have local CICSIGs. Cheri Taylor, CICSIG member and also Manager of the ID SIG, is working on this project this summer. We hope to obtain contact information for the CICSIG managers at the local levels and to list them and their contact information (e-mail addresses and Web sites) on our national CICSIG page. As far as I know, we don't have any centralized source for this information, so if any of you have information about a local CICSIG please send it to Cheri at: taylorcw@compuserve.com.

As you can see, the CICSIG is moving in directions that should provide a real benefit to the working of independent technical communicators. Your involvement in some of these projects is both expected and most welcome. Please get in touch with Kelly Burch (kburch@dallas.net) or me if you would like to volunteer. ❖

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For more information, sample policies and other resources, contact:

Business Software Alliance—

<http://www.bsa.org/>
and their anti-piracy web site—
<http://www.nopiracy.com/>, phone:
800/NO PIRACY;

Software Publishers Association

(SPA)—<http://www.spa.org/piracy/homepage.htm>, phone: 800/388-7478; and,

Software & Information Industry Association (SIIA)—

<http://www.siiia.net>,
phone: 202/452-1600.

Tom Lenzo is a training and development consultant with more than 25 years experience in high technology environments. He is also the Employment Manager for the San Gabriel Valley STC Chapter. He can be reached at tlenzo@worldnet.att.net. ❖

continued from page 1

Objectives	Options
Learn to create computer-based training.	Attend the STC conference and add a CBT design workshop on May 5-12 for \$1800 plus travel. Take course from Georgia Tech in Atlanta July 6-13 for \$1500. Take course from San Diego State through the Internet self-paced for \$250.
Learn to work better with developers and other technical people (teamwork).	Take course on conflict resolution from ABC Development in New York on September 9 and 10 for \$1250 plus travel. Take course on conflict resolution from our company downtown on February 12 and 13 for \$450 internal charge.
Learn more about user interface design.	Attend GUI design course from Design Experts in Atlanta on June 6-8 for \$850. Volunteer to work with the Human Factors group on a project this year. Purchase two GUI design books and dedicate 10 hours a week to studying them thoroughly.
Learn more about Active X.	Attend a class from Web Technologies in Atlanta on March 10 for \$595. Purchase a book with tutorial for Active X and dedicate 1 hour a day to learning the material.

Figure 3. Learning objectives and opinions

For each option you choose, know the complete cost of the training, including approximate travel costs, the location, the provider, and the duration of the training. Figure 4 on page 14 shows how the list developed in Figure 3 (above) would look after some options are eliminated.

Step 8: Identify the benefits of the training for your company

You should now have a list of long-term and short-term performance objectives for your professional development as well as a list of learning objectives that will help you move toward these goals. Now describe the benefits of each learning objective to yourself and your company. Make sure you know your corporate and departmental goals and objectives for the year (or longer) so

your training is aligned with their strategic planning. Your personal objectives and company/department objectives do not have to be exactly the same. You're going to share the company/department objectives only with your manager. Figure 5 on page 14 shows what such a list would look like.

Step 9: Document your training plan

Write a one- or two-page memorandum summarizing your training plan. Describe your learning objectives, strategies for achieving those objectives, expected cost, schedule, and benefits to the company. Make sure you have an unwritten backup plan with alternatives for each item that are cheaper, closer, or quicker, just in case you have to negotiate with your manager. Schedule your training early in the year to ensure

that you have time to apply the abilities you acquired and to beat the inevitable spending freezes and budget adjustments that occur during the fourth quarter of every year.

Step 10: Arrange a meeting to discuss your plan with your manager

Schedule a meeting with your manager to discuss your training plan. Request approval of the plan so you can do the following: (1) adjust your schedule to minimize the impact on others in the company when you are away from the office, (2) take advantage of early registration discounts or attractive travel rates to reduce costs, and (3) work toward the goals set for you during your performance review. Explain each part of your training plan in terms of how the solution helps you achieve your learning objective and what that means to the bottom line of the company (both in terms of expenses and return on the investment).

It's important to consider your audience: your manager and the person authorizing funds for training are responsible for using the company's money wisely. You have to know in advance that your training plan will help the company achieve its long-range goals, even if the return is not a literal deliverable. Make sure your manager knows that you take your professional development seriously and that you are not simply asking for a company-paid vacation. In simple terms, your manager will want to know what you will be able to do after the training that you can't do now.

Continued on page 14

10 STEPS TO CREATE YOUR PERSONAL TRAINING PLAN, PART 2

continued from page 13

Objectives	Options
Learn to create computer-based training.	Attend the STC conference and add a post-conference CBT design workshop on May 5-12 for \$1800 plus travel.
Learn to work better with developers and other technical people (teamwork).	Take course on conflict resolution from our company downtown on February 12 and 13 for \$450 internal charge.
Learn more about user interface design.	Volunteer to work with the Human Factors group on a project this year.
Learn more about Active X.	Purchase a book with tutorial for Active X and dedicate 1 hour a day to learning the material.

Figure 4. Narrowing the list of options

You may have to make some adjustments to your plan as you discuss it with your manager. However, if you followed all of the steps in this process, you should have some success. Problems may arise if your department does not have a budget for training, as is the case with many small companies. In this case, you can still pursue the process and request financial support from your company. If your manager balks at the cost, go to your backup or secondary

training methods. If your manager still balks, ask whether the company will pay half of your expenses (and offer to pay the other half). If by some chance your manager isn't overwhelmed by your dedication to your professional development and still refuses to provide any funding, ask for time off with pay so you can arrange for the training yourself. Finally, if the company doesn't provide this support (money or time off), use your personal time and money

to complete as much of the training as you can. Next year, repeat the process. If management does not offer to support your professional development in some way that satisfies you the next year (after they have had adequate time to budget money for training), use your new skills to find a better place to work.

If you are self-employed, your training plan should help you see how you can get more offers and better jobs the next time you circulate your resume. Because you are independently employed, you have the responsibility of planning the time and saving the money for training every year. It's easy to let training take a back seat when you work hourly or pay yourself, but neglecting your professional development will catch up with you eventually and may have the unfortunate cost of lowering your rate and reducing your opportunities.

If you are a manager, you need a plan for yourself as well as your employees.

Objectives	Options	Personal Benefit	Company Benefit
Learn to create computer-based training.	Attend the STC conference and add a post-conference CBT design workshop on May 5-12 for \$1800 plus travel.	Keeps me up with developments in my field and provides networking opportunities.	Lets me learn more about CBT while also learning what else is going on in the field. Will help me move our one-day sales class into computer-based training, and will allow me to gather tips and techniques for producing information products more effectively.
Learn to work better with developers and other technical people (teamwork).	Take course on conflict resolution from our company downtown on February 12 and 13 for \$450 internal charge.	Learn to work better with developers and other technical people (teamwork).	Increases my effectiveness representing our department at the release team meetings.
Learn more about user interface design.	Volunteer to work with the Human Factors group on a project this year.	Learn more about user interface design.	Teaches me more about GUI design in a cost-effective manner while developing ties between our department and the human factors group.
Learn more about Active X.	Purchase a book with tutorial for Active X and dedicate 1 hour a day to learning the material.	Learn more about Active X.	Adds an important skill not currently available in our department, which we'll need before we move all of our help projects to HTML Help in the next year or two.

Figure 5. Objectives, options, and benefits

Make sure you plan your budget to include training, and encourage your employees to follow this process to create their annual training plans. Set a yearly figure for them, ideally between \$2000 and \$3000, so they can choose the appropriate means to gain the abilities they need to accomplish the performance objectives you gave them. Don't be afraid that giving them the training will cause them to leave your company. If you show them you are concerned for their professional development, they will be more loyal than if they think you don't care about them. And you have the advantage of their new abilities while they are working on your projects.

Conclusion

In business, it's not even debated any longer that a company's best resource is its people. Any company that does not invest in its people will not be successful in the long run. But an individual is really his or her own company. You are responsible for your own professional development. You are responsible for making an ambitious yet reasonable training plan that expands your abilities. Even if your company won't provide financial support, you should be completing a training plan every year. Of course, you should be wary of companies that won't provide any support for training, because that indicates that they don't have your long-term interests at heart. Likewise, a company should wonder about employees who do not care enough about professional development to pursue some form of training plan on their own initiative.

This article was reprinted from the December 1998 issue of CommLink Online, the electronic version of the newsletter for the STC Atlanta Chapter, and with permission from the author.

Rob Houser is a founding partner of User First Services, Inc. (www.userfirst.net), which specializes in designing and creating user assistance. Rob is President of the STC Atlanta Chapter. You can reach him at rob@userfirst.net. ❖

Marketing Your Services

The Web has so much marketing "hype" and so many get-rich-quick schemes these days that it is not always easy to distinguish between useful information and propaganda, much less find information that pertains specifically to freelancing.

One of the best resources I found is an article called "Money Making Marketing Tips" by Robert Middleton (<http://www.all-biz.com/money.html>). Other useful Web sites are the Home Business Magazine (<http://www.homebusinessmag.com/>) and the Home Working Mom.com Web site (<http://www.homeworkingmom.com>).

I think you will also enjoy reading an article called "Power Freelancing" on a personal home page by a fellow named George Sorenson (<http://home.earthlink.net/~georgesoren/tips.htm>), in which he discusses some lessons he learned the hard way.

*Lori Lathrop (e-mail: LoriLathrop@compuserve.com) is a Senior Member of the Society for Technical Communication (STC) and the current President of the American Society of Indexers (ASI). The 2nd edition of her book, *The Indexers Guide to the Internet*, ISBN 1-57387-076-1, is due to be released in June 1999. Check out her Web site at <http://idt.net/~lathro19>. ❖*

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11th Annual InterChange Conference.
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19-20. For registration information
or a brochure, contact Lorraine Lupien,
lorraine_lupien@uml.edu or call
978-934-2405.

Region 5

Hot Trends for Communicators—
Phoenix, Arizona, Ahwatukee Grace
Inn, October 14-16. For more
information see the Phoenix Chapter
Web site at <http://www.stc-phoenix.com/regn5.htm>.

Region 6

**9th Annual STC Region 6 Conference,
Portals of Communication—**
Manitoba, Canada, Sheraton Winnipeg
Hotel, October 3-5. For more
information see the Region 6 Web
site at <http://www.stc.org/region6/index.htm>.

Region 7

Still Writing After All These Years
Bellevue, WA, Doubletree Hotel,
October 14-16. For more
information, send e-mail to
r7programs@stc-psc.org. ❖

Attention:

**Columnists and
Contributors**

The copy deadline for the
Fall issue is **September 1.**