Management SIG News

Keeping you informed of the latest trends in technical communication management!

Summer/Fall 2002

Is Your Documentation Project Management Process Non-Intrusive?

Donn Le Vie, Jr.
Sr. Member, Austin Chapter

Have you ever had to tough it out with engineering organizations to get access to subject-matter experts or project-related documentation so you could do your job? Have you been stymied by development's efforts to include you in project planning phases for a new product? Could it be that your documentation project management process is perceived as being too intrusive into the engineering or development project life cycle? Well, here's a way to remove that perception and show the engineering/development organization that they actually influence how "intrusive" the documentation project management process will be into their realm.

Help Them Understand Your Capabilities

Engineers, programmers, and other technical types often get uncomfortable when they have to interact with technical writers. I've seen capable, confident engineers get sweaty palms and develop nervous "ticks" when they approach the portion of the building that's home to the technical publications team to ask a FrameMaker question, or when they have to drop off a 400-page chapter of a microprocessor specification for an edit. "Relax, guys…we're here to help you," you say. Well, they get that way because they understand only a portion of what we do. For the most part, they see us only during one phase of the product development life cycle—the Development Phase. If they understood more of what it is we do—and can do—they would see the benefit of working closer together earlier in the process.

Generic Product Life Cycle (PLC)

Figure 1 represents a generic product life cycle (PLC). Many technical organizations don't engage the Technical Publications team until the Development Phase. Because the engagement is so late in the PLC, how can your project management process be anything but intrusive into engineering/development operations when you haven't been involved earlier in the PLC? It's especially intrusive when such project-critical documents are developed without Tech Pubs input. You'll have to be asking a lot of questions, interviewing a lot of subject-matter experts, and having a few meetings with engineering or development to get background project information—that's an intrusive process. You do some of that anyway, but it's a different story when you have to play catch-up during the Development Phase.

See "Non-Intrusive" on page 3.

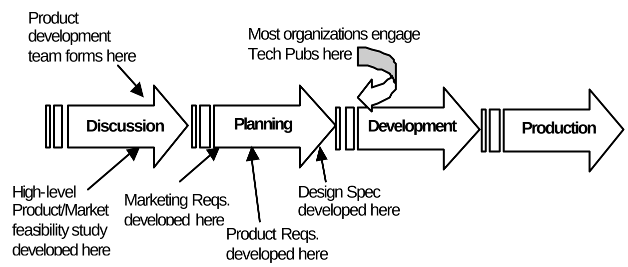

Figure 1. Generic PLC showing Tech Pubs involvement in Development Phase

Inside this Issue…

SIG Manager's Message

Saul Carliner,
Outgoing Manager, STC Management SIG

I would like to thank you all for your for support during the past year. I've enjoyed serving as your manager and have appreciated the opportunity to communicate with so many of you.

As the SIG moves into the new year, I will be stepping down as SIG Manager and Judy Herr will be stepping up to the job. Many of you already know Judy, who's one of the most active participants on our discussion list. She brings a wealth of management experience to this job.

Judy also has a long history of active involvement in STC - starting with this SIG. In this SIG, she currently serves as moderator of our discussion list (but she was an active participant long before that).. For several years, she has also organized Progressions sessions sponsored by the Management SIG at the STC Annual Conference. In addition, Judy has been active in her local STC chapter. Not only has she served as a chapter leader, but also as a leader of Touchstone, the Northern California STC Regional Technical Art, Technical Publications, and Online Communication Competition. Judy has coordinated all of the Management SIG meetings at the upcoming STC Annual Conference, and will be leading them.

I would also like to thank a number of volunteers who have helped make the Management SIG so vital during the past year:

- Elizabeth Bailey, from the Lone Star Chapter, who's been our Webmaster for the past two years, and has made significant improvements to it. She will continue this year.
- Judy Herr, from the East Bay chapter, who has served as our discussion list moderator this past year.
- Donn LaVie, who regularly writes a column for our newsletter.
- Kat Nagel, from the Rochester Chapter, who's been our membership manager for the past year, and has been welcoming each of our new members. She will also continue this year, and will be unveiling a new membership package, prepared by Tara Cipriano, a student at Bentley College. Justin Ritchie and Jennifer Stokes, students at Bentley College for their efforts on behalf of the newsletter team.
- Jennifer Square, from the Central Ohio Chapter, who has included the Management SIG in the Idea Watch Book Group, and now writes the book reviews for our newsletter.

Last, I would like to thank our outgoing newsletter editor, Brenda Huettner, from the Southern Arizona Chapter, who's done a terrific job of editing our newsletter and published it like clockwork once a quarter. Brenda has also helped to arrange the Management SIG Progressions at the STC Annual Conference over the past few years, and is a regular contributor to our SIG.

Thanks to all of you for an outstanding year and all the best in the coming year.

Letter From the Outgoing Editor

As I'm sure you've all noticed, we're in a time of great transitions. Our days are getting warmer; the sun sets a little later. The climate of our working community is in transition too. Agencies are going out of business. Long-time contractors are scrambling for permanent positions and many of our members are unemployed. This newsletter is no exception! You've probably noticed our great new design and layout. We're also beginning a personnel transition. I've had a great run, but it is time for me to step aside and let someone else be managing editor.

I truly believe that we get out of this SIG what we put into it, and I have gotten a lot from my tenure as editor. Besides the terrific exposure and opportunity to work with some great writers, I've learned about managing volunteers and managing by e-mail. I can also honestly say that I've gotten at least four contracts because of my participation at the SIG level. I encourage all of you to step forward and take action on behalf of the SIG--you'll benefit as much as I have.

You'll still see me around, of course, at various SIG activities. I'll continue to participate in the Listserv, and spoke at several sessions in Nashville. I'm also very happy to say that I'll be the Manager of the Management Stem for next year's Annual Conference in Dallas. Although it is past deadline for submitting proposals, you can still participate as a speaker in our SIG progression! Contact Jill McCauslin, SIG Progression Moderator, at jmccauslin@radcominc.net.

-Brenda Huettner

Non-Intrusive (Continued from page 1)

The best way to make your documentation project management process non-intrusive is by relating that process to the product life cycle, as shown in Figure 2.

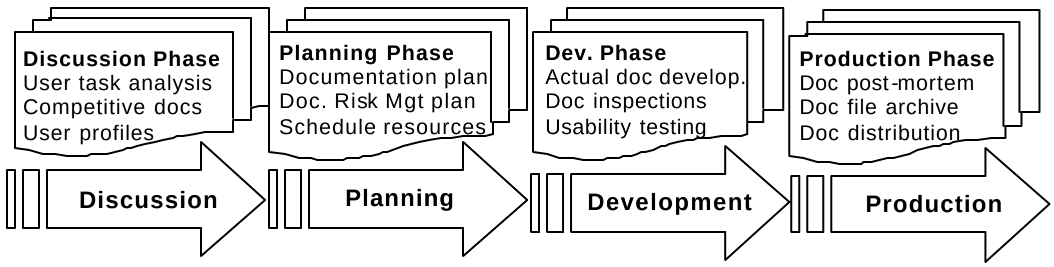

Figure 2. Relating a Documentation Project Management Life Cycle to a Product Development Life Cycle

When presenting your documentation project management life cycle to engineering or development, make sure you add this caveat: "The earlier the Tech Pubs team is brought into the PLC, the less intrusive our project management process is to your operations."

It is vitally important that the technical writer(s) assigned to the project become members of the product development team in the Discussion Phase. If you get hit with "we don't discuss documentation at this stage, so it would be a waste of your time…" you can counter with, "That may be true, but being present means we can determine for ourselves how to plan for the project as information develops. And, our project management process is less intrusive to engineering operations the earlier we are involved…" You can also add, "Being involved at the Discussion Phase means that we can place these future projects on the Tech Pubs radar. This way we won't have any surprises when the project moves into the Development Phase and you need documentation services." It's worked for me more than once.

Get involved early

Being a member of the product development team or product design team at the earliest stages is important. Attend those PDT meetings even though 90 to 99% of the information may not pertain directly to documentation. For example, learning in an initial PDT meeting that project risks include how fast the market will embrace a developing specification standard on which your product depends, or that the company will have to license technology rather than develop it, indicates possible risks to the documentation development schedule. If you weren't on the PDT and you depended on others to tell you what's important for you to know, you might not know about those deliverable milestone risks until it became a real problem.

Conclusion

Your success with being able to manage a non-intrusive documentation project management process means getting involved early in the project life cycle and scaling the level of effort to the appropriate project level. The burden for whether or not a documentation project management process is intrusive or not largely depends on engineering/development's willingness to let you get involved from Day One.

No more sweaty palms; no more nervous ticks.

Donn Le Vie, Jr. manages documentation projects for Intel's Cellular Communications Division and the LAN Applications Division, where he supports XScale™ microarchitecture projects and storage area network (SAN) projects. He can be reached at donald.s.levie@intel.com.

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Management SIG Listserv

To subscribe to the listserv, sign up online at http://lists.stc.org/cgi-bin/lyris.pl?enter=stcmgmtpic-l.

Newsletter Deadlines

Management SIG News is published on a quarterly basis. Articles, announcements, or upcoming events must be submitted by December 13 for the Winter issue. Send information to colleen.denardo@la-z-boy.com. Please include your contact and chapter information.

Future Deadlines:

March 14 (Spring) and June 13 (Summer)

Getting Off on the Right Foot with a New Team

By Kate O'Neill
admin@kathleen.net

Starting a new job can unnerve anyone, but when you're a manager on your first day with a new team, a great deal is at stake. Your success depends upon the people who report to you every bit as much as their success depends on you - so how do you establish the right relationship out of the gate? Not to worry. The guidelines below will help keep you on the right track.

Finding opportunities to build rapport

Getting to know your direct reports and their strengths and weaknesses is one of the most useful investments of time and energy during your first few weeks. Plan to spend time with each team member individually, as well as with the team as a whole or in functional units. Look for opportunities to recognize their prior accomplishments as well as their goals.

Be aware, though, of being perceived as patronizing when you reward your team. Regardless of how many years you have under your belt in the industry, they may resent having a company newcomer reward them, the veterans, for doing the job they were doing long before you entered the picture.

Above all, don't expect employees to be excited to work for you when they don't know who you are. Let your employees get to know you and your work style while you adjust to your new surroundings.

Establishing your authority

Good managers have neither the desire nor the need to be control freaks, and effective leadership involves enabling your reports to make their own decisions. However, unless you establish the process by which your authority will be demonstrated, you may end up with power struggles later.

Making your authority known doesn't entail pounding on conference tables and shouting people down when they try to speak. Rather, responsible manifestations of authority are about communicating with your reports in a clear and consistent way on issues that concern your professional relationship: what you expect of them, how they will be measured, and what your goals for the team are. If your management style is one of fairness and respect, you have a better chance of having respect in return.

Learning the ropes without looking foolish

It's tough enough to start a new job as an individual contributor – you don't really know the company, you don't know the culture, you may not even know exactly what you're doing. But when you're starting a new job as a manager, you have not only the ever-watchful eyes of your boss - you also have the scrutiny of your reports. They may not have malicious intent, but you can bet they'll want to watch you, especially at first, to make sure you know what you're doing and what you're talking about. They may even be waiting for you to trip up. How do you avoid disaster?

Perhaps the best approach, in addition to keeping your wits about you, is to keep your ego out of it and have a sense of humor. When you do trip up – and who doesn't trip up at least once in the first days of a new job - you'll earn points from all sides for having the grace to learn from your mistakes, laugh about them, and move on. All in all, your best bet in any new job is to be approachable, stay humble, and be ready to learn everything as quickly as you can. Who could ask for anything more?

SIG Leadership Members

Manager
Judith Herr
herrj@attbi.com

Listserv Moderator/Manager
Joaquim Manuel Baptista
joaquim.baptista@altitude.com

Web Weaver
Elizabeth Bailey
ebailey@attbi.com

Newsletter Editor
Colleen M. DeNardo
colleen.denardo@la-z-boy.com

Chapter/SIG Activities Liaison
Harlan Wolper
hwol@snip.net

Membership Manager
Kat Nagel
katnagel@masterworksconsulting.com

Eight Issues to Consider when Developing Metrics for Your Technical Communication Group

By Saul Carliner

Wondering how you can assess the effectiveness and productivity of your work? Admittedly, it's not easy and there are no simple approaches.

But it can be done. As you develop a program, consider these issues, which arose from a review of literature on the metrics used to assess the productivity and effectiveness of software engineering, training, marketing communications, and technical communication.

1 **Avoid using a single measure or metric to evaluate a product.** Software design and development, training, and marketing communications each track several metrics, each for effectiveness and productivity, and use each to evaluate a different aspect of the work. Spilka observes that, even within technical communication, "most industry authors advocate a holistic perspective leading to multiple definitions of quality" (210). She adds that "every measure has its unique weaknesses and cannot by itself indicate whether a product or process is high in quality" (212). Furthermore, "uniformly giving primacy of some ingredients of high quality documentation over others can be a risk, because how much these ingredients matter will vary from one context to the next" (211).

2 **Before beginning a project, determine how effectiveness and productivity will be evaluated.** Measuring effectiveness and productivity *after* the fact requires up-front planning before the fact. To be credible, results cannot be measured after the fact without comparing the data to data collected before the project began.

3 **Use objectives to assess effectiveness.** Many people define effective technical communication as that which helps users perform intended tasks. To do that, technical communicators must first state what those tasks are, and express them in terms that can they can be observed and measured. Objectives are statements that express, in observable and measurable terms, what users should be able to do after using a technical communication product. State them before beginning any design work on a project (to make sure that the designs ultimately help users achieve the stated objectives). After publication, assess the extent to which users can perform the intended tasks.

4 **Avoid measuring items that do not assess effectiveness or productivity**. Although the use of color, graphics, white space, index entries, navigation aids, and similar devices are often correlated with the effectiveness of a communication product, their presence does not guarantee effectiveness. So the data has no direct utility. In addition, measuring these design elements is extremely time consuming. It often requires detailed observation of each product. Collecting this data becomes page of a printed communication product and each screen of an online communication tedious and past experience of many companies in collecting it is that the efforts are not sustained.

5 **Use financially based measures of productivity.** Productivity is ultimately a measure of return on a financial investment. For example, marketing communicators measure the productivity of their firms by tracking the financial value of their accounts. They assess the effectiveness of their work by the number of sales a particular advertisement, brochure, or catalog generated. Similarly, trainers measure the appropriateness of their budgets by calculating training budgets as a percentage of payroll.

6 **Measure intangibles**. Saffir and Turrant observe that "quantitative evaluation is not the 'be-all and end-all' but a yardstick" by which organizations can assess their work (212). Although most metrics involve calculation of a hard number, training and marketing communications also include measurements of perceptions and feelings. For example, post-class evaluation of training courses assesses users' emotional reaction and enjoys wide acceptance among training management. Similarly, because they cannot measure financial results, public relations specialists measure perceptions and name recognition, which is the ultimate intent of their work.

7 **Review industry surveys done on similar kinds of products. Metrics represent a comparison.** Certainly those taken within an organization help participants track performance among projects. But many organizations want to compare their performance to similar processes performed by other organizations. Industry surveys in training and marketing communications allow professionals to compare some aspects of their work across organizations. In many fields (not just these), professional organizations like the

Continued next page.

American Society for Training and Development conduct these surveys. Similarly, publishers serving the trade organization, like IDG (which publishes *ComputerWorld* and other trade publications), also conduct industry surveys on software development.

8 **Remember that while results build perceptions, they do not prove value.** Although practitioners of software design and development, training, and marketing communications each rigorously collect data about their effectiveness and productivity, these practitioners have not shown that the data alone can prove the value of a service. Instead, it is used as part of a larger system of building and maintaining relationships with internal and external sponsors (Robinson & Robinson).

Although these issues do not specifically direct how to assess your effectiveness and productivity, they provide an important foundation that you can use to use to develop methods that work within your organization.

Win Your Customers through Contests and Giveaways

By Kathleen M. Vincenz kvinc@adams.com
Senior Member, Southeastern Michigan Chapter

How can you get customers and employees to use your documentation and appreciate your hard work? Give them prizes through contests and giveaways. They'll think they've won—but you really have.

Contests

Quiz them

A few years ago, after a release, I held a contest to get my internal customers to look through the documentation. On our internal Web site, we posted five questions about our software and documentation. If they answered correctly, their name was entered in a drawing for a Palm Pilot (this was in the 90's before budgets became tight).

Test their speed

At a recent user's conference, whose theme was motor sports, we held a race to see who could search the Help the quickest. We put two laptops side-by-side on a table with a bell next to each laptop. We then asked a customer and an employee to race against each other. We held up a question about the software on a large card. The competitors searched the Help, and rang the bell when they found the answer. The winner got a Hot Wheels car (the budget-tight 00's). The customers had lots of fun and a few said they were surprised to see how much they found in the Help. They even went so far as to say they would use it when they got to their offices—imagine!

Let them guess how many pages

At our annual company kickoff meeting in January, we had a table on which we scattered all the pages of the guides and online help. Employees then guessed how many pages or help topics there were. They put their guess in a bowl for a chance to win a prize. Employees really liked this one, but I think I had more fun watching them try to solve the problem (for example, measuring the height and depth and multiplying by the number of pages in an inch). The CEO also said he'd give us a trip to Hawaii when we reached 10,000 pages/topics (we were at 7,500).

Give Aways

F1 candy

At this year's kickoff, to promote the new context-sensitive help we'd added to several products, we gave away **F1** candy (dark-brown square caramels, with **F1** painted in frosting). It was easy to get the candy—we just went to a homemade candy shop and asked them to make the candy for us. We even put the candy in a keyboard box, and had put a real **F1** key on a spring so it bounced around on the table.

Grammar books

Though we've given away Palm Pilots and other items, the engineers at our company like it when we give away grammar books. We try to find humorous or unusual ones, such as Woe Is I or The Deluxe Transitive Vampire. This also allows us to promote the importance of writing well and concisely and have a little fun. These books are also relatively inexpensive, too.

The illusive idea - Show a cartoon

I once saw a Road Runner/Coyote cartoon where the Coyote buys an ACME airplane and fixes it using the manual, until the last time when the manual pages blow away. I've tried searching everywhere for this, but haven't found it. Anyone know of it? I'd love to have it playing as employees or customers entered into a room.

Book Review

The Agenda: What Every Business Must Do to Dominate the Decade, by Michael Hammer

By Jennifer Square squarej@Nationwide.com
Book review editor, Co-founder of Idea Watch

"Look for seeds of the future in the present." Michael Hammer

Michael Hammer is the originator of both reengineering and the process enterprise ideas, and his latest book is titled, *The Agenda.* The book offers nine practical business ideas for today's consumer-dominated economy, but he warns this book is "not a cookbook with simple recipes."

Hammer's purpose in writing this book was "to offer a set of concrete ideas and practical techniques that real managers in actual companies can employ to help their companies dominate their markets in the upcoming decade." He wrote the book from the study of mature companies in mature industries.

Here's a sampling of the action plan offered:

- **Run your business for your customers.** Become easy to do business with, present a single face to the customer, and anticipate their needs.

- **Give your customers what they really want**. Don't assume a product-centric outlook on your customer. What solutions do your customers seek? It's not just buying an automobile, for example. It's maintaining it, keeping it fueled, washing it, and buying insurance to protect it.

- **Put processes first.** Is yours a process enterprise? Processes are what create the results the company delivers to its customers. Everyone in a process enterprise should be able to ask answer: What process are you a part of? How do you personally contribute to this process?

- **Create order where chaos reigns.** Systematize creativity. Don't let people tell you that creativity conflicts with process.

- **Measure like you mean it.** Measure what your customer really cares about and design measures that are easy to understand and calculate.

- **Focus on the final customer**. Some companies focus on the intermediaries, rather than the final customer who uses the product. Create and manage processes to help the end customer.

- **Knock down your outer walls.** The Next Big Thing will be the demolishing of walls between companies. Processes may span corporate boundaries. For example, share data between companies to serve the same customer.

- **Extend your enterprise.** Only perform your core competencies**.**

Many lessons await the technical communication manager in this book. Technical communicators are a part of a larger business process; do we understand the implications of this? Besides offering a basic lesson on the importance of creating and managing business processes, Hammer focuses on developing deep insight into your customers and getting to know them at their work place or home. Getting closer to users is something every documentation department can focus on this year to improve our products and increase the value we add to the business process.

SOCIETY FOR TECHNICAL COMMUNICATION

901 N. Stuart Street
Suite 904
Arlington, VA 22203-1822
(703)522-4114

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Contributors to This Newsletter...

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