

## Manager's Report: Gearing Up for a Successful 2008

By Lois Marsh, SIG Co-Manager



It's been a busy summer for your SIG executive and volunteers as we prepared for a new fiscal year. We've done all our formal reporting to the STC board, wrapped up the annual budget, and started planning for next year's STC conference.

We met by phone to talk over plans for each of the volunteer positions over the coming months, and Dawnell and I participated in monthly SIG Leadership conference calls. Here are some details of what we plan:

**Listserv Update**  
List Serv Manager Eddy Frost is working with the STC office to plan for and implement a migration of our list serv system from Lyris to MailMan. He expects to complete this migration

sometime this fall. The change should be transparent – existing subscribers need take no action.

**Website Update**  
Thanks to Paul Claessen (yup, Dawnell's husband) who's helping us maintain the P&P website while webmaster Jeanna Hines takes a well-deserved breather! We're working on developing easier ways to accomplish routine updates to our website, and will eventually recruit a new webmaster to take over the reins.

**Information and Research**  
Maria Christophel discussed ongoing plans to create an index of all P&P related articles for the P&P Website.

**2008 Conference Update**  
We have invited Raymond Uργο to develop a program targeting advanced level of P&P practice. P&P SIG is also planning a progression session jointly with Quality and Process Improvement (QPI) SIG. See Dawnell's article for further details. Eddy Frost is hoping to present a session on managing a system of P&P on Microsoft SharePoint.

**Administrative Details**  
2007-2008 SIG Yearly budget and quarterly reports

are done. July's membership numbers appear to be a bit skewed. We are looking into those numbers.

Now it's time to hear from you!  
We are planning an open conference call for all SIG members on October 24th and hope many members from around the world will call in to guide us in selecting learning opportunities for our SIG.

Thanks to an increase in member dues flowing to us this year, we have some money available for learning and development projects. But where should we focus those efforts? See the Announcements page for full details on the open call.

**Survey Time...**  
In November, I will be conducting a survey of all P&P SIG members to learn:

- How you are being affected by changing communications media like web 2.0
- What tools you are using now, and expect to use in the future
- What our industry representation is across the membership

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- Whether we want an elected executive
  - Other questions TBA
- I'm looking forward to meeting many of you in the open conference call on October 24th. Talk to you then!

# Feature Article: “Managing Thyself”

By Justin Baker

Are you repeatedly contracted as a policy & procedure writer only to be stranded in a cubicle out in left field with little-to-no direction, yet are expected to identify documentation requirements, documentation milestones and deadlines? Or even worse, the documentation projects themselves? Ineffective managers abound in all types of organizations are inept at being able to manage contractors in general and policy & procedure writers specifically. “Manage thyself!” I shout from the corporate rooftops. “Manage thyself!”

From my experience and perspective, many IT managers often focus too heavily on solving everyday technical problems to compensate for their lack of management knowledge and skills. They are always putting out “fires” and delving into technical minutiae. This may be the result from having progressed through the IT ranks without proper, formal technology-management or project-management education. By default, they fall back on their old roles of everyday engineering problem solvers to the detriment of their full-time employees and, especially, their policy & procedure contractors who many times seem to be an afterthought.

## Learn Project Management Basics

As a solution to this problem, policy & procedure writers (and all technical-communication contractors) need to understand the basics of project management and need to be able to manage themselves when faced with less-than-stellar management situations. And in keeping with the nature of our general technical-documentation profession, we need to document all significant documentation progress.

To *not* manage thyself is to potentially be at the mercy of those few unscrupulous IT managers who don’t manage their projects and then blame the lack of focus and/or significant progress on the contractors.

I am not a project-management expert, but I am slowly learning project-management principles after having realized over a number of years and across a number of contracts the utter importance of managing myself.

Many projects, including documentation projects, can be structured in four stages:

- Project initiation
- Project planning
- Project execution, and
- Project closure

As policy & procedure writers, we are all familiar with the project execution phase to varying degrees, for we all produce something. But understanding the project execution

phase in more detail and understanding the other phases will help us to better execute our documentation projects as a whole and protect ourselves in particularly dire situations.

## Initiate and Plan the Project

In the **project initiation stage**, identify your documentation project and the scope of your documentation project (your boundaries of focus). In the **project planning stage**, develop a variety of plans such as a project plan, a resource plan, a risk plan, a communications plan, and an acceptance plan. Also define planning deliverables and core deliverables such as your project plan and your actual policy and procedure documents; define each deliverable’s acceptance criteria as well.

The **project plan** details the documentation project’s phases, activities, and tasks. These are the project’s work activities defined in increasingly granularity. The project plan also identifies the resources that perform the work activities. Additionally, the project plan defines a **schedule**. Apply a specific project schedule to these work activities and resources; this is where Microsoft Project™ usually comes in. Microsoft Project can successfully manage the triumvirate of *activity, resources, and time* for most basic project plans.

The **resource plan** identifies the resources in detail, the **risk plan** identifies any potential risk (although from my experience developing documentation is usually a low-risk activity), the **communications plan** specifically identifies who needs to be involved in communication during the project, and the **acceptance plan** details the persons and process for securing the acceptance of both planning deliverables and core deliverables.

## Execute the Project

In the **project execution stage**, create your core deliverable (s), which for a policy & procedure writer are policy and procedure documents. This stage involves designing and developing the deliverable, and monitoring and controlling the development of the deliverable and supporting development activities (if development is a group effort). The project execution stage also involves change management, risk management, issue management, communications management, and acceptance management.

## Close the Project

In the **project closure stage**, deliver your documentation deliverable and review your project experience for valuable lessons learned so that wisdom can be derived from your experience and be applied to future documentation projects.

## Progression Session to be Proposed for Philly Conference

*By Dawnell K. Claessen, Co-Manager*

### Call for Presenters in Philadelphia 2008

Next year's STC conference will be held in Philadelphia, Pennsylvania June 1-8, 2008. The Policies and Procedures Special Interest Group (P&P SIG) will propose a "Progression Session" to the 55<sup>th</sup> Annual Conference Program Committee.

P&P SIG is looking for presenters (and their topics) for this session. If you plan to attend the conference, and have an idea for a topic, we'd like you to develop your topic and present it as part of our progression session.

### Subject Matter for Topics

Progression sessions in 2008 will likely be two hours long. So we will need more topics than we have had in our previous progression sessions. To meet this need, we will be seeking speakers from other SIGS that have members in common with the P&P SIG.

This year, we plan to include speakers from other SIGs and from STC membership in general. Our proposal will certainly include members of the Quality and Process Improvement (QPI) SIG and the Environmental, Safety and Health (ESU) SIG.

Naturally, we will be looking for topics of relevance to members of our SIGs. But we will also be interested in related and relevant topics such as compliance, content management, career development management for those in our fields, and the tools and technologies that we all use in our profession.

If you have an idea, don't hesitate to propose it. We can always put our heads together and tailor the topic a bit for our expected audience.

### How to Join Our Proposal

It is easy to present as part of our group. Just send an email to Dawnell Claessen [mail@dawnell.com](mailto:mail@dawnell.com). **Let me know as soon as you can that you are interested in presenting.**

Be sure to include the following information:

- Your name and contact information
- Working title for your topic
- A four or five sentence abstract of your topic
- Any further details about your topic such as an outline or graphics

A short professional bio about you, especially about any speaking or presenting experiences you may have had.

**I will need your information no later than Friday, October 5, 2007.** The STC deadline for submitting proposals is October 9, 2007 and I will need a few days to prepare the proposal and enter the information online.

### What Is a "Progression Session" Anyway?

A "Progression Session" is a format for an educational session at a conference that has many different speakers presenting on various topics simultaneously. Speakers will each host a table with a presentation on a topic from their own area of practice.

Attendees hear a twenty minute presentation about one topic, and then move to another table to hear the next twenty minute presentation. This process repeats until all the time allotted for the session has run out.

Sessions in this format are very popular and are among the best attended at the conference. Progression sessions are a great way to share a lot of information in a relatively short time.

Veteran presenters and new speakers alike can hone their speaking and presenting skills as they present new topics and research.

If you have any questions, do not hesitate to contact me at [mail@dawnell.com](mailto:mail@dawnell.com) or by phone at (321) 373-4582.

## New Member Profile: Gary A. Kopf

**Direction:** Can you briefly describe your business background?

**Gary:** I have over forty years of experience in the Information Technology field, in both technical and managerial roles, mostly in the banking sector. Some of this has been as an employee, and some as owner/operator. My skills include both information technology (programming, etc.) and technical communication. I am currently running a small consulting company, ROK Southwest, Inc., specializing in converting clients' policies and procedures to online help systems ([www.policy-procedure-document-conversion.com](http://www.policy-procedure-document-conversion.com)).

**Direction:** Tell us about your work – responsibilities, challenges.

**Gary:** There are two areas:

1. Marketing:

The interesting thing is that my potential clients typically do not realize that they can deliver incredibly effective and highly accessible policies and procedures to their employees without investing in technology and without mastering radically new techniques. I guess that sounds like a sales pitch, but the point is that writing and publishing policies and procedures should be simple, something that the business unit subject matter experts can handle, and my research and professional offerings follow from that.

2. Execution:

I spend a great deal of my time “training” my clients on a couple of very specific things: technical writing style as a tool to increase comprehension and the best way to organize information, both to increase comprehension and support rapid location of specific information.

**Direction:** Tell us about your audience.

**Gary:** I market to line-of-business managers, especially those that are interested in being self-sufficient in their P&P efforts and want to avoid unnecessary technology. A “typical” client is the manager of a customer contact center. These prospects are not professional technical writers or information engineers, but are willing to learn.

**Direction:** What do you like most about your job?

**Gary:** Of course, I like the freedom of being self-employed. But most of all I like the satisfaction of seeing a client dra-

matically improve their productivity as a result of deploying really well-done and easily maintained policies and procedures.

I also enjoy the opportunity/requirement to do research in areas that are relevant to communicating business process knowledge, and applying this research in practical ways for my clients and anyone else that is interested. I have just started a non-commercial community web site to share this type of information ([www.policy-procedure-manual.com](http://www.policy-procedure-manual.com)).

**Direction:** What advice can you give to someone who wants to get into P&P documentation?

**Gary:** Study cognitive psychology and reading comprehension. The key is to communicate effectively. Nothing else really matters. Well, cost and simplicity also matter. Don't get hung up on whiz-bang technology.

**Direction:** What's the biggest P&P challenge that you face in your current environment?

**Gary:** Since my contracts are short-term and I ultimately leave my clients to manage their documentation on their own, my biggest challenge is “re-training” my clients' subject matter experts to communicate clearly and avoid distracting or misdirecting their readers.

**Direction:** Tell us a bit of personal information about you – e.g., hobbies, where you live, your family, or other information to help us get to know you.

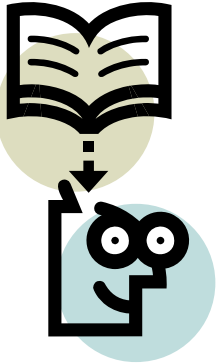
**Gary:** I “retired” to the high desert just outside of Las Cruces, New Mexico two years ago in order to form this new consulting company and enjoy the climate and wide open spaces. Prior to that I lived in Arlington, Virginia for twenty years. Running a consulting company and supplementing that with continual research leaves no time for hobbies.

My three children live in Michigan and Colorado, and all have children of their own. You can actually find out more about my “career” at [www.policy-procedure-document-conversion.com/rok-southwest-credentials.html](http://www.policy-procedure-document-conversion.com/rok-southwest-credentials.html).

You can contact Gary at [gary@roksw.com](mailto:gary@roksw.com).



## Book Review: The Basics of Process Mapping – Robert Damelio



*By Joe Melo*

When confronted with a book titled “The Basics of...”, one’s thoughts might immediately be drawn to the “...For Dummies” series: the chain of books which has so successfully franchised itself by implying that people should feel stupid for not knowing about any number of topics; topics which usually require more than a rudimentary understanding.

In “The Basics of Process Mapping”, Robert Damelio has cleverly done the opposite by taking a rather simple idea and clearly outlining the more complex opportunities available to process map developers.

“The Basics of Process Mapping” is intended for people with little to no experience in the process mapping field. Damelio’s book is described on the jacket as “...a quick and practical guide that explains the importance of process mapping..., gives step-by-step instructions for map development and interpretation..., and accents the differences between various types of process maps.

In a book as small as this one is (an easy-read at 64 pages), Damelio sets an aggressive agenda for the book, exploring topics such as the benefits of process mapping; describing the three levels of process maps; providing detailed accounts of how to develop each within your organization; explaining the relationships between each of the three process map levels; as well as ideas on how to analyse maps for possible process improvement.

Damelio does a good job of distinguishing the three levels of process maps, and illustrating how the three levels relate to one another. The use of one on-going case example throughout the book allows readers to follow the development process from start-to-finish with a singular pro-

ject, rather than have multiple independent examples tailored to each topic. The text is interspersed with several illustrations of the process maps being described, making the reader’s progress through the book relatively effortless.

Some weak areas of the book are those that talk about the idea of using process maps to analyse and improve processes in your organization; the main problem here is that this issue is too wide in scope to adequately cover in a book this size.

Damelio does a good job of giving examples of areas for improvement pertaining to his case example, but there isn’t much to go on for your own project. The guidelines provide the “what” for process improvement, but leave the reader to figure out the “how” on their own.

One other issue involves the illustrations pertaining to Damelio’s case example becoming difficult to follow as you get further into the text. On closer inspection, it seemed that the diagrams weren’t accurately illustrating the text; this might be a bit confusing for someone with little or no experience reading process maps.

In short, this book is an ideal pocket guide for a new hire or student preparing to break into the industry, as it definitely delivers on what is promised in the title: the basics of process mapping. Damelio does a good job of introducing the deeper ideas and possibilities that can come with effective mapping, but this probably isn’t the text to consult if you are hoping to increase your knowledge on how to effectively analyse your process maps to increase productivity.

*Joe Melo is a Technical Writer and Business Analyst with Bank of Montreal Financial Group in Toronto, Canada. He can be contacted at [Joseph1.Melo@bmo.com](mailto:Joseph1.Melo@bmo.com)*

**The Basics of Process Mapping, by Robert Damelio, Productivity Press, ISBN 978-0-527-76316-9—Price c.\$12.00**

### Book Reviews Wanted—And We’ll Pay for the Book!

Is there a book about technical communication you’d like to own? The P&P SIG will pay for your copy if you qualify for our book review program.

How does it work? Up to four times a year, the editors of Direction will refund the cost of a qualified book on receipt of a book review and a purchase receipt. Book selections must be approved by the SIG Co-Managers based on applicability for our readers and to some extent, price. The book must also be available for purchase by other members (i.e., still in print).

Email your proposal to [lois.marsh@bmo.com](mailto:lois.marsh@bmo.com) including the title, author, price, and ISBN number.



Managing Thyself — *continued from previous page*

This article presents just an outline of project management. Mastery of the project management’s specific components through education and experience still lie ahead of both you and me.

There are many texts that can educate us on the finer points of project management, most notably *Managing Your Documentation Projects* by JoAnn T. Hackos (Wiley, 1994). (Although I have yet to read *Managing Your Documentation Projects*, it appears to be one of the most respected books on the subject).

It would behoove us all to learn the finer points of project management, for it may help us to avoid the negative repercussions of negligent management in the workplace,

help us to increase our individual output, and bring further esteem to our technical-documentation profession. Manage thyself, for it may help you avoid the slings and arrows of misfortune (not to mention bad management).

*Justin Baker is approaching his tenth year as a technical-documentation professional. You can reach him at baker-justin@earthlink.net.*

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## ANNOUNCEMENTS

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### All Member Conference Call — Oct 24 — What do YOU Want to Learn?

At our last P&P SIG conference call in September, we decided to try hosting conference calls on a regular basis that are open to all members. Our next call is scheduled for **Wednesday, October 24, 2007**. Why not call in and:

- Suggest what webinars or other learning tools you would like to see offered in the coming year
- Meet colleagues who share your interests and challenges, whether you’re an old hand or just getting started in P&P
- Tell your leadership team how else we can serve you

The table below has all the information you need to join in.

<b>Confirmation #:</b>	<b>9235228</b>
<b>Date of Call:</b>	<b>10/24/07</b>
<b>Time of Call:</b>	<b>12:00 pm Eastern</b> 11:00 am Central 10:00 am Mountain 09:00 am Pacific
<b>Host / Moderator:</b>	Dawnell Claessen & Lois Marsh, Co Managers P&P SIG
<b>Participant Pass code:</b>	<b>10952057</b>
<b>Your dial-in numbers Participant International Number For:</b>	<b>888-876-1197</b> - United States & Canada <b>973-532-4913</b> – European Mexico, Central S. American Caribbean Asian & Indian Australian New Zealand
<b>FYI</b> If more lines are needed During your conference call <b>Please inform the operator</b> <b>866-295-1038</b>	

*Announcements continue on next page...*

## ANNOUNCEMENTS, continued...

### Call for Progression Session Presenters — STC Conference, Philadelphia 2008

The P&P SIG will propose a "Progression Session" to the 55<sup>th</sup> Annual Conference Program Committee.

If you plan to attend the conference next June and have an idea for a topic, please get your topic description and bio in to Dawnell Claessen no later than **Friday, October 5, 2007**. For more information about progression sessions, see Dawnell's article elsewhere in this issue.

Send the following information to Dawnell at [mail@dawnell.com](mailto:mail@dawnell.com):

- Your name and contact information.
- Working title for your topic.
- A four or five sentence abstract of your topic.
- Any further details about your topic such as an outline or graphics.
- A short professional bio about you, especially about any speaking or presenting experiences you may have had.

### CIC SIG Conference Call — Sept 26th — Learn about working as a contractor

Is the siren song of independent contracting luring you away from your captive employment? If so, don't get shipwrecked on the rocky shore! Get all the details on how to get started by attending a **one-hour conference call, "Getting Started as an Independent"** moderated by Linda Gallagher. Linda is the immediate past manager of the Consulting and Independent Contracting SIG and owner of TechComm Plus LLC.

Join Linda on **Wednesday, September 26th**. The call starts at 1:00 PM Eastern Time (Canada and US). **Your only cost is the toll for the call.** You will also receive a copy of the handouts Linda distributed at the conference.

To sign up for this exciting conference call, send an e-mail to Don White ([dwhite@jrtcllc.com](mailto:dwhite@jrtcllc.com)), and he'll respond to you with the call details. Hurry! Only 30 seats are available for this information-packed call!

## VOLUNTEER NEWS

### Our Newest Volunteer: Pamela Ovington—Newsletter Team



Pamela Ovington hails from Abbotsford, British Columbia in Canada. Pamela's educational background includes a degree in political science and a business management certificate.

Ten years ago, she deemed it time for a career change and obtained a certificate in technical writing. She now writes policies and procedures for Prospera Credit Union.

Outside of work, Pamela enjoys gardening and observing nature. She serves as webmaster and on the executive of [Pinegrove Garden Club](#) and also belongs to [Central Valley Naturalists](#).

She joins our SIG's newsletter team as proofreader. Welcome to the team, Pamela!

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## VOLUNTEER OPPORTUNITIES

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### **Newsletter Editor-in-Chief – Direction**

Want to develop your project management skills? Improve your communication skills? Meet great people and be a member of a dynamic team? As Editor-in-Chief, you will work with the SIG Co-Managers and our newsletter team to produce four newsletter issues a year. Full training will be provided to a committed candidate, including desktop publishing, sourcing articles and using a publication schedule.

#### **Activities**

- Solicit articles and/or suggest content of interest to the SIG's members
- Manage the publication cycle to ensure issues are published on time
- Coordinate activities of newsletter team (Associate editor(s), Proofreader, content providers)
- Lay out newsletter content using template in MS Publisher, or delegate to Associate Editor(s)
- Send final draft of newsletter for review/approval by SIG Co-Managers
- Submit newsletter to webmaster for publication
- Announce newsletter publication via STC email message

#### **Recommended talents**

Good organizational and time-management skills; ideally, some editorial experience

#### **Time commitment**

5-10 hours per issue (20-40 hours per year). To apply, email [lois.marsh@bmo.com](mailto:lois.marsh@bmo.com).

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### **Volunteer Coordinator**

Would you like to gain management experience to beef up your resume? Join us as Volunteer Coordinator and learn how to recruit, manage and motivate people. You will be mentored and supported by the SIG management team as you learn the ropes and gain confidence!

#### **Activities**

- Works with SIG Co-Managers to identify need for volunteer positions or tasks
- Develops and advertises volunteer positions or task descriptions
- Screens candidates (membership status and suitability)
- Prepares new volunteer announcement for newsletter and Website
- Assists in preparing recognition awards, such as Outstanding Distinguished Service Award
- Contacts or surveys volunteers to monitor participation and satisfaction
- Maintains and distributes list of volunteers and contact info for volunteer team

#### **Recommended talents**

Intuitive, service oriented, team-spirited, resolves people issues/conflicts, functions well in a virtual group

#### **Time commitment**

1 to 4 hours per month

To apply, email [lois.marsh@bmo.com](mailto:lois.marsh@bmo.com).