

Can't someone tell me how to measure quality?

Lori Fisher

What to measure

The most commonly-asked query to the Quality SIG web page and to the Quality SIG manager is: How can I measure the quality of my documentation? There is little agreement in our field on any standard set of metrics. Getting started is the hardest part for technical communicators who have never developed a quantitative way to talk about the quality of their deliverables. We need a "starter set" of metrics in our field that everyone can use and everyone can agree on. Technical communicators will naturally supplement such a base set with additional metrics specific to their industry, company, or customers. So, what would a base set of metrics measure?

To measure something, you must know what "it" is, and then you must develop metrics that measure "it". So, what is quality? Luckily, there are many readily-available answers to that question. Your company might also have its own definition. I suggest that, the one you choose is not as important as choosing a definition that you use consistently. For example, the August 1995 issue of *Technical Communication* includes several articles on quality. The article by Karl Smart et al is particularly useful because it summarizes many recent models of quality, then goes on to propose a new "holistic" model of quality that integrates internal, external, objective, and subjective elements. In JoAnn Hackos's book *Managing Your Documentation Projects*, she describes a process maturity model that can be used to manage quality as part of the process throughout the life cycle of a documentation project. More recently, in the August 1997 issue of *Technical Communication*, Saul Carliner adapts a model for evaluating training courses to a model that can be used to evaluate technical communication. This model of quality includes four levels of assessment: user satisfaction, user

performance, client performance, and client satisfaction. The handbook *Developing Quality Technical Information* by Gretchen Hargis, et al describes nine characteristics of quality information and how to identify them.

Whatever model or definition of quality you accept, the key is to translate the model or definition into a set of metrics that measure each of the elements of quality in your model. Measuring things because they can be measured is not useful. If something is not relevant to your definition of quality, it is probably not a good use of time to develop metrics to measure it. Instead, focus on what really matters—the core of your view of quality and which metrics would tell you something about whether your information does or does not meet that definition of quality.

A comprehensive set of metrics must measure quality from several perspectives and at several points during the development of a piece of information, no matter what model you choose to define quality. At a minimum, you might want to develop metrics that tell you something about:

- Quality of the finished product
- Lack of quality of the finished product
- Quality of the process (how reliably does it produce quality products?)
- Likelihood of achieving quality in this deliverable (predictors of quality)

How you choose to measure the quality of the finished product (and therefore **what** you measure) will depend on your definition of quality, but it must be measured. Your definition of quality will also influence the metrics you choose for lack of quality, process, and predictors. No single metric from any one area above will give you a comprehensive view of quality. But a set of metrics from several perspectives and points in

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Listserv hosting thoughtful, interesting, exciting discussions

Jennifer Atkinson

The electrons in the Quality SIG listserv were fairly buzzing with excitement with a discussion that took place around early November, 1997. To provide you with a snapshot of the value of participating in the listserv, we are reprinting some excerpts here. Deleted sections are represented with <snip>.

STEVE JONG wrote: Why would you think that for technical documentation, quality does NOT equal consistency?

DAVID NADZIEJKA wrote: Because the process part isn't the most important part of technical communication. The most important part is the "intellectual" part of evaluating the information and determining whether it is accurate, sufficient, and suitable.

Consistency is part of making a document easy for readers: headings, headers, page layout, spelling, punctuation, all used in the same form in the same situation every time, within a document and between documents. But that isn't enough. A perfectly consistent (in this sense) document with factual errors or internal contradictions is worse than worthless to the reader and to the author's reputation.

BONNI GRAHAM wrote: Am I misunderstanding something? Are you saying that a technical review is NOT part of the technical documentation process? If so, then maybe it needs to be. For me (and thus, for my clients) the technical review is one of the most important parts OF the process. <snip>

So I guess what I'm doing here is making the "intellectual" part of evaluating the information and determining whether it is accurate, sufficient, and suitable" part of the documentation process. Am I alone in doing this? Supervisor reviews (done by me) are also part of the process.

I think the documentation process is bigger that you're indicating, David. Yes, consistency in presentation is PART of the process, but the process also contains other steps that you're not addressing. For example, is every document reviewed by a) a primary developer b) someone in hotline/customer support c) someone in marketing d) other appropriate personnel? If not,

then you don't have a consistent process or a consistent document.

STEVE JONG wrote: I would say that quality is conformance to requirements, which is not really a different statement, but it lets me point out that requirements come primarily from customer needs. In other words, what the customer says is quality IS quality.

DAVID NADZIEJKA wrote: This is the quality dogma that so many people have heard so many times that it's seldom ever thought through. If my customer says he wants a cheap, fast document and gives me the time and money to produce just that, it's seldom that the product will be anything I'll be willing to call "good quality." That may indeed be the requirement, but meeting the requirement doesn't mean that I've done a high-quality job. You can meet any requirement and still produce junk.

The proof of this, to my mind, is the several times that I've produced exactly what was demanded, on the minimal budget and on time, and had the exact person who laid down the specs say, "..., this doesn't look very good. Why isn't [this nicer, and that nicer, etc.]"

In other words, 1) the customer seldom has the knowledge of what goes into a high-quality document to be able to lay down specs wisely (by wisely I mean allocating resources to produce what they really will be happy with in the end); which means that 2), the customer's requirement >seldom equates with "quality" except in the make-believe world of quality >experts, who make their money (like most management consultants) defining problems out of existence instead of solving them.

BONNI GRAHAM wrote: OK, so educating the customer about the trade-offs inherent in their requirements "UP FRONT" needs to be part of the process. Also, remember that contract documenters have two levels of customer requirements: "our" customers (who want it overnight for free, like the shoemakers' elves) and "their" customers (who want a usable document). If you educate your customers to pay attention to their customers' needs (because, after all, a happy customer buys more stuff), then a lot of this problem goes away. I see

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In search of quality

Karen Steele

Managing quality when communicating technical information is often a scatter-shoot. It can be frustrating and downright depressing to look for quality standards that apply across the broad spectrum of technical communications. Although we talk about quality within our profession, we've not come to terms with the art (science?) of quantifying quality within our projects.

Quality standards are noticeably absent from technical communication forums. Available standards tend to disagree, marked primarily by the exceptions. The discussion of quality can (and often will) go all over the map, with no clear route to the finish line. This is probably because there are so few clear definitions of what constitutes quality within our field.

Quality is a very personal issue. It's a relative matter, especially when it comes to technical communication. Documents representing high quality to you might be confusing and hard for customers to use. Your background and training may make one user guide intuitive and fun to use, while someone with a different background may find the terminology difficult and the design unfamiliar. Perception, as we all know, is everything.

Philip Crosby states in *Quality is Free* (Crosby, 1979) that quality is "a conformance to requirements." This definition was widely accepted as a standard within our field for many years. If this is the definition of quality, then achieving quality for any project comes down to a clear understanding and agreement, between the customer and the communicator, of precisely what the requirements are.

But the past decade has surely moved us past a mere conformance to requirements in our search for quality and the standards against which we must measure quality.

Whose definition of requirements should you follow when developing work? If you have more than a few customers for a single project, you will find that different customers have different needs, requirements, and proposed uses for technical information. When multiple audiences are to be addressed by a single product, whose requirements take precedence?

And what about your boss the client? Anyone who has ever produced material for a development group has probably been asked to "fix" a design flaw with creative documentation or finely tuned training materials. In this case, what defines quality? Addressing the problem after the fact with the document, or fixing the original problem? Add to this the dilemma of contractors or consultants who must please the person who authorizes their paychecks and/or extends their contracts.

Not easily defined

Ask a dozen different technical communicators and you will get at least two dozen definitions for what constitutes quality. In my experience, quality has variously been defined as:

- zero errors
- on-time delivery
- development "on the fly" with minimal support
- accuracy
- being under budget
- ability to develop from code specs
- fewer customer calls for help

Quantifying quality

Because quality is so subjective, and its definition is such a relative thing, developing quality specifications for each new project is a good method for clearly setting quality parameters.

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Quality is a very personal issue. It's a relative matter, especially when it comes to technical communication.

In the trenches

Love, truth, beauty, corn, and a little salt

Don Lenk

Some years ago a snack foods company used this line to promote their corn chips. It has stuck with me since, as a poetic statement of quality. In considering this line recently, it occurred to me that it summarizes the dilemma of quality in technical communications.

First we have the corn and salt. These are the parts that are easily measured. How many index entries exist per page? How many typos? How many glossary entries? And so on. These are corn and salt, the essential, basic ingredients of the quality recipe. As Steven Jong says in the Summer 1997 issue of DocQment, "quality must be measured." You wouldn't bake a batch of corn chips without measuring the corn and salt and still expect a good-tasting product. And you wouldn't develop any serious technical communication without measuring the essential ingredients to ensure its quality.

But we in technical communications also feel that there are ingredients of our products that are only vaguely definable, let alone measurable. In other words, the love, truth, and beauty. When my wife cooks, she measures the ingredients (by her own method of approximation) to ensure the basic quality of the dish. But she also adds her the small but important touches that she knows will guarantee that we will truly enjoy her meals. She adds the love, truth, and beauty.

Usability testing and customer surveys will give us some feel for the love, truth, and beauty portion. What did the customers enjoy? What worked for them? Did the layout enable them to find the information they needed quickly?

For most of my work, I have no feedback from real-world users. So, I use the walk-a-mile-in-his-moccasins method. I try to imagine myself using

my products the way a real end-user would. What are the lighting conditions? What is the work environment? How much education and experience do I have? Can I quickly find the information I need? Would a photo or line drawing work best here? How can the information structure be changed to make my job easier? What size and packaging are best for the way I will use the information? Is there anything confusing about the way the information is put together?

Even if you can apply the metrics, do the usability testing, and conduct the surveys, take the time to try on your customer's moccasins. Empathy can go a long way towards building love, truth, and beauty into your technical communications.

Don Lenk is an Advisory Information Developer with Lockheed Martin Federal Systems. His duties include documenting logistics support processes for ISO-9001 compliance.

...you wouldn't develop any serious technical communication without measuring the essential ingredients to ensure its quality.



Quality for ourselves

Steven Jong

In previous installments of this column I've discussed two major sources of requirements: customers, who pay for our works, and clients, who pay us to work. In my opinion, the third and final source of quality requirements is our own standards, as members of a work group or as individuals.

Examples of workgroup standards are house style guides, corporate logo specifications, document formatting templates, and boilerplate text. How do you measure conformance to these requirements? This is where checklists come in. Checklists can distill years of practical experience into a series of reminders that if completed are very likely to help you create a high-quality document. Checklists are powerful tools!

I suggest that most areas of Quality that seem beyond formal measurement actually fall under the category of personal quality. These include areas that the company style guide does not cover, minute points of sentence-to-sentence writing, or cases where your level of attention to detail exceeds your employer's. I'm talking about things that no customer or engineer would ask for, or likely even notice. Do you format your document so that the next writer can work with it easily? Do you edit indexes? Do you spell-check callouts? Try a brainstorming exercise: List your personal quality ethics — those things you do that no one asks for. Then list how you know when you achieve them?

I mention personal quality last for a reason. In areas where the company has a voice, I think we

must ignore our own quality impulses. For example, if you don't like numbered level heads, but you work for a company that dictates their use, you can't justify refusing to go along. You might try to change the standard, but in my opinion refusal leads to poor-quality work, because it doesn't conform to requirements. (It would be equally poor work if the positions were reversed.) Worse, you start a feud: you include them, the next writer takes removes them, you put them back... It's all so much scrap and rework. Finally, if customers require something, we always try and satisfy them, even if it means breaking house rules. In my opinion, satisfying customer requirements is our highest quality priority.

Another aspect of personal quality is the quality of our work environment. At one level this means obvious things such as whether we have the right tools, a quick computer, a quiet office, and sufficient light; but it also means whether we're secure. What difference does the well-being of the writer make to the quality of a document? Dr. Deming was the first to say that unhappy or insecure workers do poor-quality work. Recent studies predictably demonstrate that stressed-out or sleep-deprived people have trouble thinking. If we can't think straight, can poor quality lurk far behind?

Next time: Getting documentation right the first time

Steven Jong is Documentation Group Leader at Lightbridge, Inc. in Waltham, Massachusetts.

...if customers require something, we always try and satisfy them, even if it means breaking house rules. In my opinion, satisfying customer requirements is our highest quality priority.

There may be many reasons that customers are dissatisfied that might have little to do with the documentation.

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time can give you, as a technical communicator, a much more complete view of what is unsatisfactory in your information deliverables and how it became that way during the course of the development process. As a working example, I propose one specific set of measurable items for each of these four areas, based on a definition of quality as meeting customer requirements as they are described in *Developing Quality Technical Information*.

- Quality of product: **customer satisfaction** ratings
- Lack of quality: **defects** such as technical errors
- Quality of process: **key process checkpoints** such as technical reviews
- Predictors of quality: **in-process indicators** such as editing

Defining a base set of metrics

In this section, with product and process versus people in mind, I propose a base set of metrics to measure each of the four areas described above. While there are certainly many metrics that could be used in each area, my proposals for a minimum set are:

Customer satisfaction metric

Conduct a customer survey with a 1-5 scale of overall satisfaction. With a little creativity, you should be able to find a way to ask customers one question on a scale of 1 to 5 about their overall satisfaction with the documentation. This question could take the form of phone calls, customer response cards, written surveys, etcetera, and would probably be asked along with other questions. There may be many reasons that customers are dissatisfied that might have little to do with the documentation. But, the goal should be to follow up on the data by asking dissatisfied customers “why?” and analyze the answers for ways to improve your processes (including the documentation process) to prevent these errors from recurring. This also clarifies that this is a process and product, not people, measurement, and that the way to improve the product is to improve the process. Asking this one question consistently over time provides a baseline for comparison—across projects, across releases of a single project, from one project to the next.

Defect metric

Count the number of customer-reported errors per title. Every documentation group must have a way to identify and measure technical accuracy

errors. For commercial products, I recommend counting help line calls that result in changes to the documentation. Every company has a way of communicating customer-reported errors, which require updates to the documentation, back to the publications department. These errors must be captured, counted, and tracked over time. A decrease in these defects, meaning an increase in quality, can be measured over time by a decrease in the number of support calls.

Process checkpoint metric

Count the number of substantive reviewer comments per 100 pages. *Substantive comments* refers to comments about accuracy, completeness, clarity, or usability as distinguished from comments about stylistic conventions, spelling errors, or formatting. A useful distinction is between comments that affect a customer’s ability to use the information to complete a task, versus comments on a reviewer’s aesthetic or stylistic preferences.

This metric may be especially controversial given the wide range of implementations of reviews and inspections. However, technical reviews remain the one most common quality assurance activity for technical communication groups across companies and industries. There may also be a tendency with this metric to confuse measurement of the process with measurement of the person. This metric can be compared only for like information (for example user guides to user guides, not user guides to reference material) and probably only within relatively stable groups such as one company or even one unit within a company. Still, as a trend indicator over time, it can be a very valuable measure of your process and how effective your reviews are in getting defects out of the documentation before it is shipped. Perhaps counter-intuitively for some technical communicators, more comments per 100 pages is good. It demonstrates that the review process is being exercised and the information is being improved by the process.

In-process metric

Compare developmental edit improvement from first draft to final draft. *In-process metrics* are quality metrics that are taken while you are still in the midst of the process. When effective, these measurements help you predict the quality of the final completed product before you complete it, giving you a chance to correct or improve quality before proceeding. In-process metrics must be developed by watching trends over time and correlating these trends with final quality.

A practical in-process indicator is monitoring improvement after an initial edit. Does anyone

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SIGNificant news

Meet us at the Annual Conference!!!

Lori Fisher, Quality SIG Manager

Our annual Quality SIG meeting will be held Tuesday morning at 7:30am during the breakfast hour in the Balboa C30 room in the Anaheim Hilton and Towers. Please join us to meet other members of the SIG and to let the SIG leaders know how we can work together in the coming year to make the Quality SIG even more active and effective.

On Tuesday at noon, the Quality SIG will host several tables at the SIG Networking Luncheon so you can eat and converse with others interested in quality issues.

The following sessions will be offered on quality during the conference:

MG 2C, "The Quality Dilemma—Giving Clients What They Want vs. What They Need"

MG 2L, "Managing Quality: Systems and Metrics for Ensuring Quality in Products"

MG 3M, "Quality in Action: What Technical Communicators Are Doing Today to Improve Quality"

MG 5C, "Distributed or Centralized: How to Maintain Quality When They Keep Reorganizing Your Organization"

We hope to see you in Anaheim!

Membership report

Robbie Rupel

Greetings from St. Louis!

In the last newsletter, I reported that we had 266 members in our SIG. Three months later, I am pleased to report that our membership has grown to 375 members (an increase of almost 30%)! Most of this increase can be attributed to people electing to join the Quality SIG when they paid their STC dues for 1998.

A total of 308 members (82% of our membership) reside in the United States. The membership breakdown (by state) is shown below.

State	State	State
Arizona: 5	Arkansas: 3	California: 60
Colorado: 14	Connecticut: 3	Florida: 7
Georgia: 12	Illinois: 12	Indiana: 5
Iowa: 3	Kentucky: 1	Maine: 1
Maryland: 7	Massachusetts: 13	Michigan: 12
Minnesota: 17	Missouri: 5	Nebraska: 1
New Jersey: 6	New Mexico: 6	New York: 16
North Carolina: 12	Ohio: 19	Oklahoma: 2
Oregon: 2	Pennsylvania: 9	South Carolina: 4
South Dakota: 1	Tennessee: 5	Texas: 24
Vermont: 3	Virginia: 10	Washington: 7
Wisconsin: 7		

A total of 67 members (18% of our membership) reside outside of the United States. Their membership breakdown is shown below:

Country	Country	Country
Australia: 3	Austria: 1	Belgium: 2
Canada: 38	Finland: 1	France: 4
Germany: 1	India: 1	Ireland: 1
Israel: 4	Japan: 5	New Zealand: 2
Republic of Palau: 1	Singapore: 1	Slovenia: 1
Sweden: 1		

If you have questions about the Quality SIG membership, please direct them to me at rupel@inlink.com.

Robbie Rupel is the Quality SIG Membership Manager.

Numbers must be analyzed in the context of what unusual circumstances or constraints were in effect during that development cycle and what you know from experience about the relevance of that metric to final results.

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check to see that editing comments are actually implemented? This can be a binary measurement: yes, the draft improved after the initial edit, or no, no improvement changes were made after the initial edit. This metric implies two things: (1) Someone is doing editing, whether it be a full-time editor is doing formal edits or documentation team members are doing peer edits. (2) Someone looks at the information again before publication to evaluate whether changes have been made and whether the final draft has improved since the initial draft. This does not have to be a comprehensive edit, just a check of key items noted in the original edit.

This valuable metric tells you very quickly when you have taken a “shortcut” from quality by skipping an edit or not fully implementing editing comments. If we know that good technical editing does improve the quality of information but we know that we have not edited a piece of information, we know that the information will not be as good as it could be. At this point the measurement should trigger a business decision: how important is this prediction of lack of quality given other considerations such as schedule, cost, and so on? Although it may seem simplistic at first blush, that is the beauty of this metric: easy to implement, cheap to measure.

What to do after you have measured

Measurement is not the goal—improving your process and your final documentation is the goal. A measurement is a tool to help you reach that goal. Numbers must be analyzed in the context of what unusual circumstances or constraints were in effect during that development cycle and what you know from experience about the relevance of that metric to final results. Over time, you may change this base set of metrics to a set that proves to be more relevant to your particular process and

environment. Continually monitoring trends in your measurements for particular pieces of documentation is key to developing the most useful set of metrics over time.

For example, finding a high number of technical errors in a particular book may lead you to examine your review process and to discover that key reviewers did not take part in that review. You could improve your process by making certain reviewers “mandatory”, and by making it clear that a review will not conclude without comments from them. Another example might be monitoring customer satisfaction trends to see if they go up or down over time, and asking customers when the rating does improve about what difference they now see in the information. Their answer might be applicable to other information, so the ratings for that information can also be improved.

One can argue for a unique set of metrics based on individual processes and company biases. As a profession we have no way to compare our work or to credibly tell our executives or clients how good our work is in ways that can be universally understood. This base set of metrics could be a start to gaining agreement on a few common quality elements that we all can measure. If you do not have a system of quality metrics in place today, implementing even one of these proposed measurements will provide you with valuable data for analysis leading to improved processes and products. If you feel you have a good system of metrics in place already, share them with the Quality SIG on the listserv or write an article for *DocQment* so we can develop the best set of base metrics possible for technical communication.

Editors note: A longer version of this paper will be presented at this year's STC Annual Conference.

Lori Fisher manages Data Management User Technology, an organization of information developers, human factors engineers, graphic designers, and production staff working at IBM.

BookQueue

Document management and editorial review

William H. DuBay

If you haven't read *Managing Your Documentation Projects* by JoAnn T. Hackos (Wiley), run right out and get it. It might be the best work you will ever own on technical communications. Written by one of STC's most popular speakers and a former STC president, it details the real-world problems of getting a project conceived, developed, and out the door. It also shows how to get managers to support the quality process. Based on the findings that developing information requires a series of steps, Ms. Hacko's book divides the process into five phases:

1. Information planning: what sort of document is required?
2. Contents specification: what goes into the document?
3. Development and review: writing, editing, testing.
4. Production and delivery of the physical document.
5. Evaluation of the project, the team, and the managers.

While critics (like myself) say that quality control cannot make good writers out of bad, the process championed by this book makes writers better and more consistent performers over time. This is the result of the required planning and editorial review.

Planning requires all the major players in the project, including management and engineers, to sign-off on the design of the project before work actually starts. Planning not only promotes the success of projects, it develops skills in estimating their costs.

Editorial review is at the heart of the quality process. We have known its importance since King James put editors in charge of the 54 scholars translating the Bible in 1603. Whether we use an editor or use peer editing; editorial review is an integral part of the writing process. It promotes consistency throughout a company and from one project to the next. Through this form of collaborative writing, we share our skills with one another and all become better writers.

Ms. Hackos says that managers cannot overestimate the importance of good development editors (as distinguished from copy editors). She writes, "The developmental editor plays a major role in training new writers and ensuring that the highest standards of work are maintained... The developmental editor plays one of the most significant roles in assuring the consistent quality of publications" (p. 372).

I love this book. I take it to meetings and quote from it frequently. It makes sense of the documentation process and of how technical communicators can function as professionals within a company.

If you want to further sharpen your editorial and writing skills, bookmark these Web sites:

Resources for Writers: <http://www.marlboro.edu/~nickc/forwrite.html>

Resources for Technical Communicators: <http://www.interlog.com/~ksoltys/techcomm.html>

Resources for Science and Technical Writers: <http://www.inkspot.com/genres/tech.html>

Internet Links for Technical Communicators: <http://www.muohio.edu/~mtscw/techcommlinks.html>

Bill H. DuBay is a Principal Technical Writer at Phoenix Technologies, Ltd. You can reach him at email: bill_dubay@phoenix.com.

Planning requires all the major players in the project, including management and engineers, to sign-off on the design of the project before work actually starts.



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this education as PART of my quality process. If, after I educate them, they still want it overnight for free, I make them sign a waiver that explains exactly what quality trade-offs they're making. Haven't needed to use the waiver yet, BTW.

STEVE JONG wrote: Another thought on the subject: If you write a technical document that your customers love, your peers admire, your client admires, your boss is thrilled with, and you're proud of, I would say it is by all accounts a quality document.

DAVID NADZIEJKA wrote: No argument here. The question (ever unanswered) is exactly what goes into producing such a masterpiece? I suspect Bill is right: It's too complex to quantify.

BONNI GRAHAM wrote: I'm not so sure. STC provides guidelines via the Pubs competition that detail what your peers will admire (at least that's the theory). If you ask them, your customers/readers will tell you what they will love. If you have a process that allows you to come in at/under budget with a reasonably attractive document, your boss will be thrilled with/your client will admire it. If you manage to do all of these things, you will be proud of it (at least until you learn something new that you want to try...or am I the only one that happens to? <snip>).

I'm not just blowing smoke. On the projects this year that have come in at/under budget, we followed my process completely. We ended up with happy readers (based on the feedback from my clients), peer awards, admiring clients, and I'm dang proud of them. The only projects that have been over budget were ones where we didn't follow the process or where the client presented a different picture of the project during bidding than turned out to be true during reality.

<snip>

BILL DUBAY wrote: Steve, would you mind telling us how process improves accuracy? Determining the accuracy of a text is a highly intellectual and even creative skill. One engineer can certify a text as "accurate," though another may see it as misleading. I see a lot of our work as technical writers as limiting the creativity of readers, by making a statement bullet proof, meaning one thing and no other. This demands a high level of skill, maybe something that cannot be taught. It means looking at a text and seeing all the ways a reader can interpret it.

Certainly a process that demands multiple reviews will tend to produce more accuracy than one that does not. But the end result always depends on the skill of the reviewers. With a machine, and even with software, it either works or not. A

process over time can eliminate the things that cause failure. Telling people how to use the machine is not so easy. You have to think about motivation, feeling, rhetoric, attention, mnemonics, clarity, precision, legibility, and all the other things inherent in transferring understanding and skill from one person to another. The more good people you can engage in wrestling communication problems to the ground, the better, of course, and that is what process can do. But process cannot do the work. It can only organize it.

STEVE JONG wrote:

Does the review process in and of itself improve quality? I would say no, because you can lead a horse to water, but you can't make it read through the last appendix. It does "correlate" to improved quality, because reviewed documents are less likely to have as many errors.

In a similar vein, calculating a readability-index score can correlate to improving readability, but if you sample the table of contents, the copyright page, and a bulleted list instead of sampling block-paragraph text, you'll get a false result.

What is needed is both a "process" and a "protocol" for conducting that process. Yes, conduct reviews; but help the reviewers by showing them what to look for. To build up their skills, editors have editing checklists, writers have style guides, and reviewers should have some protocol available. Otherwise, they're just hacking away in ignorance, and probably enjoying the process no more than you are.

By the way, another posting expressed difficulty in relating the work of Dr. Deming in statistical quality control to documentation. At the risk of sounding very immodest, I've studied the question for some years now, and I think I've found the way! I've written papers for the ITCC on the subject. I intend to keep posting to this group, but I also contribute a column to DocQment, the newsletter of the STC Quality SIG, on the subject. At the rate of 400 words a quarter, it's going to take me several more years to finish my thesis, but you're welcome to follow along! (I also post the columns to my Web page, along with illustrations, but no faster than I write them.)

Editor's notes: Steve's web page is:

<http://members.aol.com/SteveFJong/>

To subscribe to the STC Quality SIG listserv, send a message to majordomo@stc.org and in the body of the message enter: SUBSCRIBE stcqsig-l <your e-mail address>

Jennifer Atkinson is a technical consultant in the Bay Area.

I see a lot of our work as technical writers as limiting the creativity of readers, by making a statement bullet proof, meaning one thing and no other.

From *Searching* on page 3

As the products we support become more sophisticated and the technology more involved, it's important that we set quality standards and initiatives.

It's easy to assume that quality can be measured by the number of comma splices or structural faults in a document. But focusing on these things almost always means we are missing the bigger picture—that of accurately identifying and assessing our audience and delivering timely and useful solutions for their problems. Yet, the comma-splicing type errors must be addressed.

Tools for ensuring quality

While managing quality within technical communications is an inexact science at best, here are some helpful tools for defining quality for a project:

Document prototypes

Developing a document prototype as a basis for discussions at the beginning of a project is helpful for determining how quality will be measured for this project. When the client can anticipate and add feedback to the “look and feel” of the project, expectations are more easily determined and met.

User profiles

Developing user profiles helps us understand how that user's needs are best handled. Clients generally know their customers well enough to offer valuable insights, which adds to our quality initiative.

Quality agreements

When you and your client agree on who is the user and how users will use your product (document, on-line help, training guides, etc.), what constitutes quality in this project becomes more readily apparent.

Agreements of this nature tend to be somewhat informal. Recapping the discussions in a memo or e-mail, and circulating it to the appropriate parties confirms your agreement. This memo (or e-mail) then becomes the yardstick against which quality for this project must be measured.

Planning for quality

Quality must be planned into a project and managed over the project life. Ensuring quality means building the time for reviews into the project plan—both the technical and the editorial reviews. It means taking the time to assess the needs of the user and setting aside time to meet and come to agreement on how quality will be measured and by whom it will be measured. It means that we must always take the time to plan the project carefully, so that each quality standard is identified and met.

Because quality is so hard to measure, it is important we bring it to the table early in any project, discussing it thoroughly and documenting those findings. Projects are then built from this level, as we find new and better ways to improve the process.

Quality is a cycle that continues throughout our work. A cycle where we analyze, propose, develop, and deliver, then once again analyze and elevate. A cycle of constant listening, observing, and quantifying which we hope will refine and improve, producing products more responsive to the needs of the users while meeting the expectations of our customers.

Managing our projects for quality is not easy, and won't get significantly easier until we, as a profession, begin talking about quality, planning for quality, and defining quality in a forum of our clients, customers, and peers.

Karen Steele is an Associate Fellow in the Lone Star Chapter of STC and manager of the STC Consulting and Independent Contracting SIG.

Quality must be planned into a project and managed over the project life.

DocQment

Quality SIG Newsletter

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