Double Tall Consulting was engaged to evaluate the performance of the Documentation department, then provide recommendations to increase productivity.

This report contains detailed recommendations and implementation guidelines substantiated by data collected through on-site interviews, customer interviews, S.O.S. documentation assessments, and competitive documentation assessments conducted as part of this audit.

Report

S.O.S. Documentaton Department Audit

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Double Tall Consulting

2014

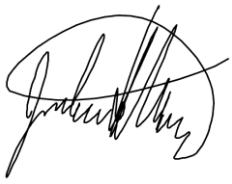
Foreword

There are many stories about companies that have implemented DITA toolsets and enterprise content management systems. They all start the same and they all go like this:

> *Once upon a time, a forward-thinking company decided that they would benefit from adding DITA toolsets and/or an enterprise content management system to their documentation process. Their justification for doing so was that it would save time, save money, or provide reuse opportunities throughout the company.*
>
> *So, the forward-thinking company started the process of adding DITA toolsets and/or an enterprise content management system.*
>
> *And they did this, and they did that, and they did the other thing, and things looked like they were moving smoothly towards a good implementation.*
>
> *AND THEN ONE DAY, the forward-thinking company decided that they could skip a step in the normal sequence of best practices: they didn't run a successful pilot project, there was no substantive audit before they began implementing, they laid off the staff necessary to monitor the process, or there wasn't a clear implementation strategy that everyone was working towards.*
>
> *And everything started to fall apart at the forward-thinking company: Documentation took longer and longer, writers got frustrated and angry, and nothing worked right….*

Every story about implementing a DITA toolset gets to this point. Where the story goes from at this point depends on what the company does.

S.O.S. has gotten to this point in the story. This report identifies the options for what to do next, as well as several other ways in which S.O.S. can save money and improve efficiency in the Documentation department.



John V. Hedtke

Executive Summary

This section summarizes our final recommendations. Supporting assessments, results, observations, and implementation guidelines follow in the Detailed Report.

Purpose

Our primary task was to explore and identify if there are places where the Documentation department can do anything better/differently to save money or time.

Our secondary task was to make recommendations for saving money and time, based on our discoveries.

Recommendations at a glance

In our research, we have found several possible avenues for saving up to $1.2M annually as well as providing productivity improvements in the Documentation department.

> *NOTE: These opportunities for savings come at no/very minimal cost to S.O.S.*

Double Tall Consulting recommends that S.O.S. implement the following opportunities for long term savings and quality improvement as soon as possible.

Savings and improvements

- ☐ Eliminate the DITA toolset.
- ☐ Eliminate printed documentation except where necessary for regulatory compliance and customer demand.
- ☐ Eliminate translations on higher-end/lower-volume products except on demand.
- ☐ Partner with a third-party vendor who produces “how-to” video clips about products.

Short term investments for long term returns

- ☐ Start several junior writers with the Documentation team.
- ☐ Move the Documentation department under the product lines.
- ☐ Work with a technical consultant to review what can be salvaged from the DITA toolset and how to maximize the value of the reversion to [authoring tool].
- ☐ Move datasheets back to marketing.
- ☐ Identify the features of competitors’ documentation that are currently better than S.O.S.’s and incorporate these in S.O.S. documentation.

The remainder of this report is dedicated to providing the supporting audit data and insights that support our recommendations AND guide you to a realistic and immediate implementation.

Immediate savings and improvements

The following changes will improve productivity and substantially reduce documentation costs.

Eliminate the DITA toolset.

The DITA toolset is not providing any benefits to anyone at this time, nor is there an effective strategy in place for achieving any of the potential benefits of DITA. Worse, the DITA toolset is slowing down the writers. We recommend that S.O.S. stop using it and go back to [authoring tool]. (Note that there will need to be a reversion strategy developed to avoid unnecessary delays and expense, but this will not be too difficult to create.)

Eliminate printed documentation except where necessary for regulatory compliance and customer demand.

S.O.S. is currently spending $800K/year for printing documentation and perhaps another couple hundred thousand for freight, shipping, storage, inventorying, and disposal. VOC data shows that shifting to a searchable online document format will cause little or no problem with the customers. Moreover, eliminating printing gives the writers an additional two weeks of writing time prior to a product deadline because materials do not have to be shipped to a printer.

Eliminate translations on higher-end/lower-volume products except on demand.

Manuals are translated into 11 languages as a matter of course, but on higher end products with low sales volume, it may not be necessary to translate documentation in advance. The sales cycle is long enough to allow for translation on demand. Although the costs savings are indeterminate, eliminating the translations on a single suite of product documentation could easily save $30,000 per product release. The number of translations that can be eliminated is not clear, as this will be based on a number of variables that are still TBD, but it's possible that this technique may save as much as $150,000-$200,000 a year.

Partner with a third-party vendor who produces "how-to" video clips about products.

The customers expressed a clear desire for more video clips describing how to do individual tasks. Our research showed that video clips on YouTube produced by several third-parties are extremely popular. For a minor investment in time only, S.O.S. could have one or more third-parties producing "how-to" video clips that would provide valuable customer information at no cost.

Short term investments for long term returns

We found several areas where a relatively small investment on S.O.S.'s part will pay handsome dividends in short-, middle-, and long-term revenues to the company.

Start several junior writers with the Documentation team.

The initial cost of funding several junior writer positions is strongly offset by the short-term payoff of documentation not missing NPIs. (A delay in an NPI launch of just a couple days can equal the cost of a junior writer's annual salary.) In addition, there are medium-term benefits of better quality documentation and greatly improved writer morale, and long-term benefits of knowledge transfer, overall product improvements, and greatly increased adaptability.

Move the Documentation department under the product lines.

This acknowledges that documentation is, in fact, a part of the product (which is the perception of the Documentation team and virtually everyone else we interviewed). This move will provide the writers with more direct access to their engineering teams, make the product line managers happier because they will have more immediate access to their writer(s), and provide an environment that is conducive to producing both more in-depth and use-case based documentation.

Work with a technical consultant to review what can be salvaged from the DITA toolset and how to maximize the value of the reversion to [authoring tool].

There is no one at S.O.S. who has the ability to assess the current DITA implementation or [authoring tool] and produce an objective evaluation of what needs to be done for the Documentation department for maximum efficiency and return. This requires an outside technical consultant familiar with the current capabilities of [DITA tool] and [authoring tool]. This person will be able to appraise the current DITA implementation and see what can be salvaged as well as design a reversion strategy that minimizes lost time and money.

Move datasheets back to Marketing.

The datasheets are being worked on by the Documentation department but there is no added value. In many cases, the writers are simply acting as desktop publishers, which is a waste of their time and abilities. Marketing's needs would be far better served by retaining the datasheets and either hiring a low-end desktop publisher or by sending datasheets out to a contractor or contract service. This will speed up the process of creating datasheets for Marketing and will also free the writers to do more substantial documentation tasks.

Identify the features of competitors' documentation that are currently better than S.O.S.'s and incorporate these in S.O.S. documentation.

Our analysis has shown that the S.O.S. documentation is very usable, but it isn't nearly as inspiring as it can be. It does not convey the most important message: that **S.O.S. products are the best anyone can buy**.

S.O.S. products *are* the best anyone can buy, so it's important that every part of the products reflects this message. The good news is that improving the message in the documentation can largely be done with better document design and formatting, which is largely a matter of creating better templates and documentation styles, which tends to be a one-time cost rather than an ongoing cost, regardless of the tool used to create documents.

Detailed Report

This report contains detailed information about the recommendations identified in the Executive Summary. It also contains analyses of the underlying issues and summaries of data from on-site interviews, customer interviews, and document assessments conducted as part of this audit.

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Background

This section provides an overview of the process we followed to formally assess the quality and receptivity of the S.O.S. customer documentation.

Introduction

Double Tall Consulting was engaged to audit the performance of the Documentation department, and then provide recommendations to increase productivity.

Here is the process we followed:

- ☐ Defined core issues for investigation
- ☐ Assessed samples of S.O.S., BREATHE, and competitor documentation
- ☐ Interviewed customers
- ☐ Submitted a Phase 1 Report
- ☐ Interviewed employees
- ☐ Submitted final audit report

Core issues under investigation

These questions define the foundation of the audit. Responses were collected through customer and employee interviews, casual observations, critiques of S.O.S. documentation, and competitive documentation analysis.

Internal issues

- ☐ What is the Documentation department's mission and general goals?
- ☐ What tasks are the Documentation department focusing on?
- ☐ How are the members of the Documentation department feeling and why?
- ☐ What obstacles are blocking the Documentation department's efforts?
- ☐ Are the right tools and resources in place to accomplish the Documentation department's goals?

External issues

- ☐ How do the customers feel about the Documentation department's efforts currently?
- ☐ What can the Documentation department do to make the customers happier?
- ☐ How are the other teams (engineers, marketing) interacting with the Documentation department?
- ☐ How do the Documentation department's efforts align with the division's goals?

S.O.S. and competitor documentation assessment

A thorough assessment of S.O.S. and competitor documentation samples was completed and the results were compiled in a spreadsheet entitled, **S.O.S. Documentation Eval.xls**.

Assessment criteria

- ☐ **Information design:** Organization, Structure, Presentation, Usability
- ☐ **Navigation:** Accessibility, Index, Search (OH), Links (OH)
- ☐ **Media:** Color, Text, Creativity, Writing,
- ☐ **Language:** Definitions, Editing
- ☐ Overall impression

S.O.S. and BREATHE documentation

Company	Type	Document File name
S.O.S.	User Manual	filename.pdf
S.O.S.	Datasheet	filename.pdf
S.O.S.	Service Manual	filename.pdf
S.O.S.	Technical Reference	filename.pdf
S.O.S.	Declassification doc	filename.pdf
S.O.S.	Online help	filename.pdf
S.O.S.	Programmer manual	filename.pdf
S.O.S.	Reference--examples	filename.pdf
S.O.S.	Printable App Help	filename.pdf
BREATHE	User Manual	filename.pdf
BREATHE	QuickSheet	filename.pdf
BREATHE	Installation manual	filename.pdf
BREATHE	internal document	filename.pdf

Competitor Documentation

Company	Type	Document
Competitor A	Service Manual	filename.pdf
Competitor A	Datasheet	filename.pdf
Competitor A	Datasheet	filename.pdf
Competitor A	Datasheet	filename.pdf
Competitor A	Configuration guide	filename.pdf
Competitor A	Programmer manual	filename.pdf
Competitor A	Disassembly manual	filename.pdf
Competitor A	Troubleshooting guide	filename.pdf
Competitor A	User/Pgmr Manual	filename.pdf
Competitor A	Online help	http://Competitor A.com/wireless/helpfiles/blah.htm
Competitor A	User Manual	filename.pdf
Competitor B	Datasheet	filename.pdf
Competitor B	User Manual	filename.pdf
Competitor B	User Manual	filename.pdf
Competitor B	Online help	http://www.competitorb/webhelp/thing_help.htm
Competitor C	Datasheet	filename.pdf
Competitor C	User Manual	filename.pdf
Competitor C	Online help	cmpetrhelp.chm
Competitor C	Online help	cmpetrhelp.chm
Competitor D	System Recovery sht	filename.pdf
Competitor D	Ops Manual	filename.pdf
Competitor D	Programmer manual	filename.pdf
Competitor D	Datasheet	filename.pdf

Interviews

In order to evaluate the Documentation department's performance and identify issues, interviews were held with S.O.S. employees, and a small sample of customers who had downloaded documentation from the website.

In addition to interviews, we casually observed the writers on site to investigate the writing process and identify any additional issues.

Customer interviews

During the month of [date] customer interviews were held with [#] customers, from North America and Europe, who had recently downloaded documentation.

The following data was collected from the customer phone calls.

- Motivation for downloading documentation
- Content requests
- Design requests
- Constructive feedback
- Positive feedback, and
- Recommendations.

Employee Interviews

Interviews were performed with Documentation team members and various management roles in the product lines, manufacturing, operations, field marketing, worldwide marketing, and customer support. These interviews were held on site at S.O.S. in [location] from [date] to [date].

On-site interviewees

One-on-one interviews were completed with the following individuals:

- Abigail, Sr. Mgr. Customer Documentation
- Bernard, Sr. Mgr. Web Operations
- Clint, VP Manufacturing and Operations
- Dave, GM Widget Product Line
- Erica, Customer Care Center
- Francesco, Widget PL Marketing
- Grant, WW Marketing, Field Marketing Sr. Mgr.
- Hermione, Rocket Science Program and Engineering Management
- Isabella, Video Program Management
- Justine, Van Riesen, RS Program Management
- 11 customer documentation writers and other members of the Documentation department, who volunteered feedback anonymously

Observations and Initial Conclusions

This section describes the observations and initial conclusions that came out of the interviews, specifically addressing the foundational questions designed to cover the full scope of the audit.

INTERNAL ISSUES

- *What is the Documentation department's mission and general goals?*
- *What tasks are the Documentation department focusing on?*
- *How are the members of the Documentation department feeling and why?*
- *What obstacles are blocking the Documentation department's efforts?*
- *Are the right tools and resources in place to accomplish the Documentation department's goals?*

EXTERNAL ISSUES

- *How do the customers feel about the Documentation department's efforts currently?*
- *What can the Documentation department do to make the customers happier?*
- *How are the other teams (engineers, marketing) interacting with the Documentation department?*
- *How do the Documentation department's efforts align with the division's goals?*

Observations of internal issues

Internal issues are defined as obstacles blocking efficiency and adoption of technical communications best practices in order to meet the Documentation department's mission and general goals.

What is the Documentation department's mission and general goals?

According to Ron Potter, the Documentation department's vision statement is "We provide customers with the engaging and interactive product information they need to learn faster, work smarter, and invent easier."

The department's general goals are to provide the necessary technical documentation to support new product launches and maintain existing technical documentation as necessary. The department is also responsible for managing the translation of documentation into the various support languages.

The Documentation department also recently added the marketing datasheets to their tasks.

What tasks are the Documentation department focusing on?

The Documentation department is currently focusing on writing and maintaining the primary technical documentation for the products. In addition, the Documentation department is doing desktop publishing work for the datasheets, which are actually written by the Marketing team.

How are the members of the Documentation department feeling and why?

Morale in the Documentation department is worse than it's been in over 30 years. Writers are feeling burned out and unappreciated, and will probably start leaving for other jobs or just retiring shortly. For S.O.S. to survive, it's essential that new writers be signed up as soon as possible to start taking over writing functions and start knowledge transfer while there's still time. (It's estimated that the process of transferring knowledge to a new writer takes a minimum of 2-3 years and can easily take longer because of the enormous expertise of the writers at S.O.S..)

A large number of writers also expressed complete distrust of management's intentions.

What obstacles are blocking the Documentation department's efforts?

There are several obstacles blocking the Documentation department's success:

The DITA toolset

DITA is a good technology that can do many things well, but none of the benefits have come to pass. This is due in large part to an unclear implementation strategy, which is vital to a successful DITA implementation.

Every single writer expressed varying measures of anger and frustration at how difficult the DITA solution has made things and how much extra time it takes. Moreover, when asked directly as part of the wrap-up process, the writers were unanimous in saying that the DITA toolset will never make the documentation process faster, cheaper, easier, or better. In fact, they said, the DITA toolsets' results look worse and add significant (unnecessary) time to the documentation process.

The writers concluded that there is no significant reuse of content now nor at any time in the foreseeable future, and there is no value to the DITA solution in its current form.

Too much work

Every time a writer has been laid off or retired, there have been no replacements. Instead the work has been divvied up between the remaining writers.

At this time all the writers are working extra hours to achieve minimal success and meet their deadlines.

Some of the product line managers and other people expressed a clear awareness of the unwieldy workload and they are all filling in as much as they can to help do the writers' job so that NPIs are not delayed, but these are stopgap measures.

Lack of communication

The writers have all expressed a keen interest in knowing what's happening, what the direction for their group is, and how they fit into the company's overall goals.

Many of the writers made it clear that they didn't expect a voice in the goals—although they suggested it would be nice—but they simply wanted to know what was going on. This information, for whatever reason, has not been forthcoming despite several years of requests on their part.

Lack of recognition

The writers have requested many times for some basic recognition of their extra effort. This has not been forthcoming and it has caused a significant degradation of morale. Such recognition does not have to be big nor expensive, but an acknowledgement that writers have made deadlines and done well because of their own perseverance or creative problem solving.

Are the right tools and resources in place to accomplish the Documentation department's goals?

No. Neither the right tools nor adequate resources are in place for the Documentation department to be successful.

The [DITA tool]/[XML Editor] toolset does not improve efficiency and the DITA implementation is flawed.

As mentioned above, the DITA toolset has been a major obstacle to success. Although DITA could be of great value to S.O.S., the current implementation and lack of strategy are both causing slowdowns in producing documentation. (A number of writers related ways in which they had developed workarounds so they didn't have to use the DITA toolset so they could be successful in meeting their deadlines.)

Writer resources are pushed beyond standard limits and burnout has begun.

The Documentation department is also seriously lacking in resources. Writers have been cut from the department for years and work has piled up on the remaining desks. Documentation quality has suffered and the writers are all in varying stages of burnout as a direct result.

> *NOTE: Documentation department attrition is common, as is the consistent result: overworked writers stretch themselves to deliver unsustainable results, and then suddenly quit, leave for other jobs, or retire, when they surrender to burnout.*

Sudden dissolution of Documentation departments causes disastrous delays and cost overruns for parent companies. The delays cost vastly more than providing the additional necessary documentation staff in the first place.

We have seen many Documentation departments over the years in similar circumstances: grossly understaffed for the quantity of work being demanded of them with no additional resources available. There were no good outcomes for the companies where the companies didn't provide additional resources.

The S.O.S. Documentation department has repeatedly risen to the occasion and achieved goals through heroics and uncompensated overtime, but this is not sustainable.

It should be noted that there are three members of the Documentation department who are either very close to retirement age now or could retire tomorrow, so this is an immediate problem.

There is no one at S.O.S. currently who can do the technical assessment of the various tools and create reversion or salvage plans.

S.O.S. needs someone with up-to-date skills in DITA, [DITA tool], and [authoring tool] to make clear, objective evaluations of what to do. At this time, there is no-one at S.O.S. with these skills.

They don't have anyone with the requisite technical knowledge and experience to select the best authoring tool, publishing tool, short-term and long-term strategy for a unified content strategy because the biggest mistake/best practice that wasn't followed is your content strategy was driven by the tool choice rather than completing a substantive audit, which is the best practice for launching any enterprise content management initiative.

Observations of external issues

External issues are defined as obstacles blocking external and internal customer satisfaction.

How do the customers feel about the Documentation department's efforts currently?

Neutral to the documentation and fiercely loyal to the products

Of the customers interviewed, half indicated that the documentation didn't cause them any problems; therefore, it must be pretty good. The majority of the technicians and engineers had at least 10 to 20 years' experience using S.O.S. products for reliable results, and expressed sincere loyalty.

> *"Thank God you still service the R2D2 Widget; they're our premier device."*
>
> *"There's no substitute for S.O.S.," and, "I'm always happy to help S.O.S.; you have a good day now."*

Disappointed by weak content

However, the other half of customers interviewed expressed concerns that the documentation lacked real world examples, went into far too much detail considering they just wanted to find the instructions on how to change the settings, and didn't offer any advice around best practices for standard application techniques. For example, one customer expressed that he would prefer to see content that addressed how to use the scope to solve problems rather than only functions and features.

> *"Needs to have more real world examples; the documentation is very rudimentary and doesn't teach how to use the tools effectively."*

Unacceptable quality

The most glaring concern that was shared by a third of the customers interviewed, was that the quality of the newer documentation and Online Help was unacceptable.

Example

One customer finds that the R2D2 Widget document is well done and would like to see it carried forward to the C3PO Widget documentation.

The C3PO help menus are not as well done as the documentation they're used to seeing:

- hard to find the information
- finds documentation to be inconsistent
- specifically, the actual menu for the drivers is difficult to understand
- observed that the content in the help is reused for the R2D2 and C3PO drivers and he was expecting unique information
- inconsistently written and the format varies in samples for XML code

Bad news first, case study

This customer is a Senior Programmer working for the government in California, with a team of three other developers reporting into him.

They use several S.O.S. products for developing custom solutions, including:

- R2D2 Widget
- C3PO Widget
- EWOK Driver

Recently he had a terrible experience with the C3PO Widget and the EWOK Driver when he downloaded the documentation and tried to use it to figure out how to use the product. He ended up ignoring the documentation citing that, "it was horrible," because of poorly written English that looked like it was from India.

His cool idea regarding instructional videos …

This particular customer was kind and direct as he provided his constructive feedback and shared a suggestion regarding YouTube videos. He said that for the StarWorks 700 series, on YouTube, there's a 3rd party tutorial that shows a real circuit done by a guy with a foreign name, and that S.O.S. should farm out the development of instructional videos to him.

The good news is that even with a poor documentation experience, he prefers S.O.S.…

> *"… because once you get used to a particular brand, you stick with it, and S.O.S. has the reputation for being the best."*

What can the Documentation department do to make the customers happier?

Introduce use cases where the devices are applied to solve problems or complete specific tasks, and improve the quality and writing of the documentation that is currently produced in India.

Use cases

We heard the same message from the writers, the product line managers, customer support, and the customers… in short, every segment we talked to all said the same thing: **everyone wants to see more use cases in the documentation**.

- The *customers* want to see scenarios in the documentation of the "How would you use this unit to accomplish this kind of thing?"
- The *writers* expressed substantial regret that their schedules didn't allow them to do any of this kind of documentation anymore.
- The *product line managers and customer support* interviews also supported this conclusion: they would like this kind of documentation again, too.

Improve the content and writing quality of materials developed in India

Customers expressed concern that not only was some of the documentation poorly written, the content, in some cases, was incorrect, inconsistent, and poorly designed.

How are the other teams (engineers, marketing) interacting with the Documentation department?

The other teams all appear to interact with the Documentation department well. There has been some concern expressed that the writers are getting more and more overworked and that the risk of slipping deadlines is increasing.

The other managers and team members we interviewed were all strongly sympathetic to writers and the resource shortfall.

As mentioned earlier, several of the others are picking up the slack at this point to help the writers. It should be noted that this can only work temporarily, as the people doing this have other things to do that will eventually preclude them from helping the writers, and deadlines will start slipping.

How do the Documentation department's efforts align with the division's goals?

The answer to this question is currently in flux, as the recent layoffs and reorganization has changed the leadership of the Documentation department.

Initial conclusions

During the course of the customer interviews and the on-site interviews in [location], we learned a number of important facts.

There is some overlap of detail, already addressed in the observations, (such as the problems with the DITA toolset and morale issues) but there are additional details, which have a bearing on our final conclusions and recommendations, as follows.

Conclusions

- ☐ Customer loyalty to the S.O.S. brand is the single biggest asset S.O.S. has, and everything S.O.S. does should be measured against this.
- ☐ S.O.S. wants documentation out Fast, Cheap, Good.
- ☐ This is the greatest documentation team we have ever seen.
- ☐ All the writers hate using the DITA toolset.
- ☐ All the writers want information from above on where they're going and how they fit in with the company's goals.
- ☐ All the writers disagree with the idea that they're "Marketing." They think of themselves as "Engineering."
- ☐ Morale is as low as it's ever been and writers will probably start leaving/retiring shortly
- ☐ Documentation department leadership has done a poor job of selling the value of documentation to the rest of S.O.S.

The remainder of this section expands on each item identified in the checklist above.

Customer loyalty to the S.O.S. brand is the single biggest asset S.O.S. has, and everything S.O.S. does should be measured against this.

The customers expressed a strong appreciation of S.O.S. as "the best product," "the gold standard," "the thing they wanted to buy." This was strongly supported by testimony from the writers and the product line and customer support people we interviewed: S.O.S. products are considered to be the best in the business and, to an extent, they sell themselves based on this well-deserved reputation.

(This esprit de corps also extends to the employees, who believe in S.O.S. and the products S.O.S. makes. Even the ex-S.O.S. employees we've known always speak well of the company and their time here.)

> *"We prefer S.O.S. because once you get used to a particular brand, you stick with it and S.O.S. is the reputation for being the best."*
>
> *"I can't remember the documentation, so it must have been good."*

Why this is important is that S.O.S.'s reputation is justifiably strong and continues to this day… but this reputation is not indestructible. Customer loyalty can be damaged by bad products, bad documentation, or bad support. And, once damaged, customer loyalty is very hard to regain. As such, it is essential for our recommendations that anything that can affect the documentation's quality or availability must be assessed for any potential risk to customer loyalty.

S.O.S. wants documentation out Fast, Cheap, Good.

There's a common saying about "You can do things fast, good, or cheap—pick any two." This is also stated as the order in which you want things. After conducting the internal interviews, it's clear that S.O.S. wants their documentation to be fast, cheap, and good, in that order. (Note: there is no negative association with this or any other order for these priorities. It's simply important to know the company's preferences so that the Documentation department's processes and procedures can be aligned with them.)

This is the greatest documentation team we have ever seen.

We knew from our past professional connections that the S.O.S. Documentation department was very good, but we were unprepared for the superior quality, expertise, competence, ability, and devotion in this team.

We cannot overemphasize this point: **This team is the single best team we have ever seen. It is better than any team we have managed, it is better than any team we have known, and it's better than any team we have ever heard about.**

This team is an incredibly rich asset for S.O.S. (This is an opinion shared by many people at S.O.S. at all levels.) Writers have been here for as much as 30+ years, which is simply unheard of. Many of them were technicians of one kind or another for years before that. They have as much expertise as many engineers. Writers this good are impossible to find in the marketplace; you must grow them yourself.

This is not something we expected to be saying. It is both a pleasure and an honor to see a team of writers this good.

All the writers hate using the DITA toolset.

As was mentioned earlier, every single writer was clear with us that they felt that the DITA toolset was wasting their time and causing them problems. There are many good reasons for this, but they all boil down to a lack of a coherent implementation strategy and inadequate resources to make this happen.

All the writers want information from above on where they're going and how they fit in with the company's goals.

This point was covered earlier in the question about obstacles to the Documentation department's success, but it should be noted again that the writers want to know what's going on. Not only is this likely to result in increased morale, but it is possible that the writers may be able to develop innovative solutions to existing problems.

All the writers disagree with the idea that they're "Marketing." They think of themselves as "Engineering."

With the elimination of Centralized Engineering, the Documentation department is currently under Marketing, which is the only other group currently that is horizontal throughout S.O.S. However, what the Documentation department does is not "marketing." Marketing is focused on pre-sales activities and documentation, while what the writers do (and are good at) is technical writing, which is part of the product. Marketing writing is substantially different than technical documentation and it is a rare writer who can do both well.

There's an old saying that's popular with software developers that "We could ship the product without the documentation a lot easier than the documentation without the product." That's true in some cases, but for S.O.S. products, they'd ship the products right back.

In the old days, when products were done with tubes or even transistors, engineers could figure out a lot about the product just by popping the back of the case off and looking at it. They could say "Oh, they're using this IF amplifier here!" and figure out the vertical frammistan adjustment through their own knowledge. Now, however, the products are heavily software driven and the only way you can find out if there's a given function and how it works is by referring to documentation. There is no external indication on the chip case what's inside and decompiling the code in a PROM or custom chip is not practical for anyone but the terminally curious.

Except for the datasheets, the output from the Documentation department is part of the product. The department is grouped under Marketing, but that's organization and not what they do. Thinking about the group in as part of Engineering, responsible for producing an essential part of the product will make the Documentation team happier as well as help find additional opportunities for them to help the company.

Morale is as low as it's ever been and writers will probably start leaving/retiring shortly

As mentioned earlier, writers will be leaving soon due to resignation/retirement unless there are immediate positive changes.

Documentation department leadership has done a poor job of selling the value of documentation to the rest of S.O.S.

Rather than promoting the value-add of the full spectrum of technical communicator competencies, the department leadership has assumed that people just know what's been happening and the value thereof. Had the group's full capabilities been effectively marketed, it's highly likely that they wouldn't be having these problems now.

Interviews and Assessments

This section contains the primary results of the interviews and the assessments of S.O.S. and competitor documentation samples.

COMPONENTS

- *Interviews with customers*
- *Interviews with S.O.S. employees*
- *Interviews with S.O.S. customer documentation writers*
- *S.O.S. documentation assessment*
- *Competitive documentation assessment*

Results from customer interviews

This section provides a summary of findings from customer satisfaction interviews. The two most common requests for improvement were as follows:

- Document applications of the product through specific scenarios/use cases and explain HOW to complete tasks following best practices.
- Improve consistency across different documentation sets for easier navigation.

About the users

- Two distinct audiences: first time/periodical users and seasoned users transitioning to newer releases.
- Typically software developers or architects who work at their computers, locally or remotely, for most of the day.
- Some developers just test the products and don't use them.
- Many old S.O.S. products out there, still working fine – appreciation for continued support.
- Infrequent users need the documentation every time they borrow a S.O.S. tool for one-off tasks.

Motivation for downloading documentation

- Existing customers investigating new releases to determine if there is value in upgrading.
- Reseller downloads detailed documentation for potential customers who want intricate product descriptions and applications.
- Look up how to change settings for infrequent changes and more complex setups.

Content requests

- **Document applications of the product through specific scenarios/use cases and explain HOW to complete tasks following best practices.**
- Illustrate how to solve problems, instead of describing functions and features without context.
- List the recommended accessories for different products.
- Define terms like "frammistan."

Design requests

- **Improve consistency across different documentation sets for easier navigation.**
- Improve search-ability.
- Make it easier to determine whether user is reading Microsoft Help vs. C3PO interface Help.
- More YouTube videos showing scenarios and best practices.
- Introduce more Quick Start Guides to complement additional YouTube videos for initial orientation.

Constructive feedback

- If only looking up procedures or "change settings," too much detail to sift through.
- User observed that the writing was poor and it looked like it had been written in India.

- The C3PO help menus are not as well done as the documentation they're used to seeing:
  - Format varies in samples for XML code
  - Hard to find the information because the documentation is inconsistent – specifically, the actual menu for the EWOK drivers is difficult to understand
  - Observed that the content in the help is reused for the EWOK drivers and the STORM drivers and he is expecting unique information
  - He finds that the HAN 50L0 document is well done and would like to see it carried forward to the EWOK drivers documentation

Positive feedback

- Customers say they prefer S.O.S. because once they get used to a particular brand, they stick with it and S.O.S. has the reputation for being the best.
- Half of the interviewees indicated that they "can't remember the documentation, so it must have been good." (Note: In general, when customers don't mention the documentation, this is a sign that it's working right.)

Tentative Marketing Recommendation

S.O.S. already donates software to educational institutions and are recognized for community involvement. Consider partnering with a thought leader at a leading university to drive your realistic scenarios – the potential for context development for blog content is rich.

Get the grad students to blog about their challenges, successes, and findings, and you will have another source for sustaining your high SEO scores.

Results from employee interviews – not on Documentation team

These are the top issues raised by management and other roles outside the Documentation department:

- ☐ Heavy Documentation workload is both detrimental and unsustainable
- ☐ Documentation is on critical path and cost of delay is $10 to $50K/day
- ☐ Team attrition has led to eroded perception of value
- ☐ Lack of documentation strategy has led to poor resource allocation
- ☐ Writers must be involved much earlier in the product development process
- ☐ Move to paperless documentation
- ☐ Quality of documentation from India is poor
- ☐ Dedicated writer for product groups
- ☐ Documentation needs more application content

The remainder of this section expands on each item identified in the checklist above.

Heavy Documentation workload is both detrimental and unsustainable

The writers are very smart and their expertise is enormous. It takes years to develop this kind of expertise, and while they are outstanding at dealing with deadlines, they do it through herculean efforts that simply can't be sustained.

Writers are a part of the critical path for product roll-out, and the writers are clearly constrained. There's a requirement to lighten the workload by getting junior writers to support the team. Documentation is part of the product and must provide a dependable consistent foundation of resource information.

Documentation is on critical path and cost of delay is $10 to $50K/day

The most common concern is that the product documentation is on the critical path for product release and the delays are scaling, resulting in major costs ranging from $10 to $50K each day a product slips.

> *"If a product launch slips a week, that's the cost of a writer's salary for a whole year."*

Team attrition has led to eroded perception of value

Over the years of documentation team attrition, the engineers have been doing a lot of the content and the writers have been editing and formatting more, which has eroded the perception of value of the writer role in S.O.S. Most of the writers have been with the company for 5 to 10+ years and can contribute to process improvement on many levels.

Lack of documentation strategy has led to poor resource allocation

The overarching concern is that there is no documentation strategy and the writers are going from one fire to another. They're not being allocated properly and there's incredible discomfort around reducing quality to make their deadlines.

There's a bigger role docs can play if they are designed to be the source of online content.

Writers must be involved much earlier in the product development process

The documentation should be started before things become urgent. Currently, writing doesn't begin until four to six weeks prior to shipping. As a result, the documentation isn't deployed on time. The product managers do a lot of soaking up of work that should be handled by the writers right at the end of the product development release cycle.

This reactive approach to documentation does not support the customer needs, such as task-based application content and service manuals for making purchasing decisions.

> *"We've found a way around delaying the product, but it's been a fire drill. When the developers are trying to get things done [in the last month], they're jammed up and doing reviews and so on aren't optimal. This is because writers don't have time to start sooner and are running from one fire to another."*

Move to paperless documentation

It was unanimous that moving to paperless documentation is ideal. The older users are rigidly keen on printed documentation; however, as one manager pointed out "they're not buying the new products!"

It's important to note that paperless also refers to FAQs and videos and best practices scenarios; it does not just mean PDFs.

Ensure the transition to paperless features the introduction of cool new information sources and an optimized search engine on the home page.

Quality of documentation from India is poor

The perception is that documentation is a constraint and that management has responded by hiring temps in India, and that the results are working against S.O.S. best interests.

Work from India is not only grammatically poor, it is also riddled with broken links and inaccurate content. They are so out of the loop, it degrades the overall perception of quality. This is commonly perceived as a risk.

Dedicated writer for product groups

Several managers identified the value of having dedicated writers in the product groups. It's ideal when the writers don't move around too much so they have product knowledge. And considering the majority of the writers have been with S.O.S. for multiple decades, that's valuable.

> *"Having a dedicated technical marketing writer would solve so many problems!"*

Documentation needs more application content

The following statements were made in regards to a need for reviving application content in the manuals:

- If the manuals had more application content, the service calls would go down.
- Instead of a user manual, we get documentation.
- Depth of the documentation has not kept up with the increasing depth of the products.

Results from interviews with the S.O.S. Documentation writers

The following issues were raised by 50% to 100% of the writers interviewed in a one-on-one setting.

One-on-one interviews

- ☐ Team morale is at an all-time low
  - No individual or team recognition for several years
  - No professional development opportunities
- ☐ DITA solution takes up to twice as long and is killing morale
  - No implementation strategy for evolving DITA solution
  - No or training strategy for evolving DITA solution
  - No print preview
  - No comprehensive search and replace
- ☐ No time to write application content
- ☐ Outsourcing to India wastes time
- ☐ Marketing is the wrong group for us to be in; it should be Engineering
  - Datasheets: Lack of synergy with technical manuals wastes time
  - Product line immersion

Group interview with writers

The following questions were asked of all the writers at the end of the week of one-on-one interviews and job shadowing.

- ☐ Is there any significant reuse of content now or at any time in the foreseeable future?
- ☐ Will the DITA toolset ever make things faster, cheaper, easier, or better?
- ☐ Is there any value to the DITA toolset in its current form?

The remainder of this section expands on each item identified in the checklists above.

Issues raised by writers in one-on-one interviews

The following issues were raised during interviews with the Documentation department team members.

Team morale is at an all-time low

The team feels misunderstood and underappreciated and does not trust management. Severe lack of transparency in short and long term planning, especially around the implementation of the DITA toolset.

Recurring layoffs for no apparent reason

The writers see no reason for the layoffs except for continual belt-tightening to maximize short-term profits. The message from leadership is that writers are viewed as fungible.

> *"We hear about the shareholders. Whatever happened to the customers?"*

No individual or team recognition for several years

Ron has openly admitted to the team that this is a weak area for him; however, he's never put effort into rectifying the situation, and the team harbors resentment as a result.

No professional development opportunities

Technical communication methodologies and technologies are always evolving, especially now when communication sits at the root of most process improvement initiatives. Without the opportunity to go to conferences or other educational events, critical competencies stagnate.

To restrict the customer documentation team from professional development introduces risk that your processes and methods won't follow best practices, as has been demonstrated by the poor DITA implementation.

DITA takes up to twice as long and is killing morale

Using the DITA toolsets—which requires three applications to be open at once—causes the process to take anywhere from 10% to 200% longer.

[Authoring tool] was one tool. [DITA tool] is multiple tools, all of which must be open at all times. A number of writers also expressed annoyance at being unable to get larger monitors to make it easier to keep all the new tools open, despite the relatively small cost and large ROI to the company for doing so.

No implementation strategy for evolving DITA solution

Without a short term or a long term strategy for the DITA implementation, the writers are unable to navigate the pitfalls of the new system, since they lack knowledge of the short and long term plans for the tools.

In terms of technical support for the DITA toolset, Herman Patil operates on a reactive technical level—responding to the pitfalls the writers encounter, as they arise, which causes delays and breaks rhythm for the writers.

No training strategy for evolving DITA solution

Long ago, there was brief training on the new DITA toolsets; however, much time passed before the writers actually started using the tools. Beyond that, no training has taken place.

While there is an internal online Help repository for instructions, it is not kept up to date, nor does it define context or best practices. The writers don't have time to update the help—one more responsibility—nor engage in the learning process to figure out the constantly changing tool options.

Writers lose time "figuring out" how to complete various functions of the toolset, rather than writing content.

No print preview

The time killer with the DITA toolset is Print Preview, which takes 7-8 minutes for small docs or 20-30 minutes for large docs. [Every writer brought this up in their interviews.]

No comprehensive search and replace

[DITA tool] is a problem. For example, one writer has to check out each and every of 1700 topics manually to search them. Another writer has to check out about 3000 topics manually.

What the writers do now for looking at what they've done is to create a PDF, which takes 20-30 minutes, and then search the PDF.

No time to write application content

All the writers expressed concern that they don't have opportunity to talk to customers or go to tradeshows with the Marketing team. As a result, the documentation doesn't provide "real world" context on how the products are used.

Writers used to work with the tools in a far more hands-on fashion, but now there's no time to do so, resulting in shallower, less useful content.

Outsourcing to India wastes time

Quality of work coming from India is poor and wastes more time in content revisions/updates and drafting email messages to clarify task instructions.

> *"The quality of work of the Indian writers is typically low. It required more time on the first manual to fix the mistakes and make it readable than it would've been to write it myself in the first place."*

Marketing is the wrong group for us to be in; it should be Architecture

The writers all agree that they should be working alongside the engineers–that's the most natural pairing, and the way it's been done for decades. The shift to Marketing is unnatural in the S.O.S. culture.

Writers feel that marketing needs stronger leadership since no effort has been made to explore their full set of competencies and rather than welcome their expertise, they've been isolated from the marketing culture.

Under marketing, with effective collaboration, writers could leverage contextual information on how the target market utilizes S.O.S. devices. Unfortunately, this synergy hasn't been realized.

Datasheets: Lack of synergy with technical manuals wastes time

The datasheets break the writers out of their normal rhythm for writing hard technical content. Datasheets are marketing writing; everything else is technical. Marketing writing causes resentment in the team and forcing people to do it is damaging morale.

The datasheets were brought over to customer documentation in the interest of content reuse; however, the result is heightened "back-and-forthing" with marketing to get the content right. The process would be faster if the datasheets could go back to the Marketing team.

Product line immersion

Most of the writers would prefer to sit with the product teams, where they can overhear product conversations, and belong to the project team, rather than be an outcast of marketing.

The more natural pairing for contextual information is with the Architects rather than marketers.

Issues raised by writers as a group

On the final day of interviews, the writers were brought together for a final group interview that focused on the major issues uncovered during the week. This provided an opportunity for us to verify some of the things we had heard consistently in the writer interviews.

Is there any significant reuse of content now or at any time in the foreseeable future?

No. Outside of product families, no, there is no reuse. There is substantial trouble keeping track of everything (and a general feeling that the time spent in hunting for reuse opportunities is not worth the time regained). In addition, there's no implementation strategy.

There were many comments about the speed problems and the problems with conversion.

Will the DITA toolset ever make things faster, cheaper, easier, or better?

No, to all four. The results generated by the DITA toolsets look worse, offer no pagination control, there are graphics resizing problems, and there's no guidance on multiplatform output strategy. Herman is viewed as a critical path.

Everyone in the group wants to add more use-case/scenario-based documentation. In addition, most of the people we talked to in other departments as well as the customers said that more of this would make their lives easier, too.

Is there any value to the DITA toolset in its current form?

No. There was a failed pilot project using datasheets, but the failures were clear and were not resolved before implementing DITA for everything.

The comment was "We're being told to do without strategy."

Results from S.O.S. documentation assessment

This section provides a summary of the findings of our documentation review.

Detailed results of the standardized assessment for S.O.S. and competitors can be found in the documentation review spreadsheet, entitled **S.O.S. Documentation Eval.xls**.

The document files we reviewed will be made available in a large downloadable handoff if anyone cares to look at them further.

S.O.S. documentation assessment results

S.O.S. documentation tends to be slightly stodgy and had a slightly "cramped" feel in many cases. The layouts were, moreover, blocky and didn't flow as smoothly as they could have.

(While it's unknown if this is a specific problem caused by the use of the DITA toolset, many of the writers have said that the DITA toolset offers substantially less control over layout than the [authoring tool] system used previously.)

This was particularly visible in the datasheets, which should have been done by a desktop publisher to make them look their best.

Weak design degrades usability

There are many formatting options that could be implemented in S.O.S. documents to make them better and more accessible:

- S.O.S. documents don't use much color, even though the documents are available online and have color screenshots and pictures. The design for the S.O.S. documents is very spare.
- The general page layouts for S.O.S. documents are not as attractive as some of the competition's documents. For example, several of the S.O.S. documents used a two-column format on the pages, yet the content on the page made it unclear where the eye was supposed to follow. (At least one of these documents was done by the Indian writers, so it's not clear if this is a general quality problem with that team.)
- Chapters and headings are not clear, nor are they used effectively to break up information. Something larger and more visible on the page would be good.
- The document TOCs range from good to so-so. Most of them do not clearly identify chapter breaks, which makes navigating the document difficult. In addition, a summary TOC (a chapter roadmap) and chapter-level TOCs with links would be very helpful for improving usability, particularly in larger documents.
- The programmer's reference manuals would benefit from improving the display of the command syntax to match most other similar manuals. The information is all there, but the display of it, using larger type, italics, and so on, would make it more readable.

While it's unlikely that there would be a specific visible ROI from adding these features, changing the templates for future documents will result in snappier documents that are more readable and generally more attractive. It will also make the documentation feel more current and creative.

BREATHE documentation assessment results

We reviewed only a few BREATHE documents, all of which were for smaller, simpler products. What stands out about BREATHE documentation is that they:

- Make heavy use of graphics (a la IKEA) to show how to set up/use their products.
- Use little or no color, but they don't need to.

Comparing BREATHE and S.O.S. documentation

Comparing BREATHE's documentation to S.O.S.'s is apples and oranges, but it's worth noting what BREATHE does with illustrations to minimize the costs of translation and maximize the usability of smaller documents.

Results from competitive documentation assessment

In addition to reviewing the S.O.S. and BREATHE documentation we'd been given, we downloaded and reviewed documentation from the following competitors:

- Competitor A
- Competitor B
- Competitor C
- Competitor D

Competitor A

Competitor A has the best documentation of any in this review. Their documentation beats S.O.S. documentation in every category:

- better bookmarking
- better TOCs (and almost always chapter roadmap TOCs and chapter-level TOCs)
- better indexes
- better use of color in documents
- better and more consistent two-column formatting
- more attractive datasheets

Competitor B

Competitor B is second to Competitor A. Their docs are about on a par with S.O.S.'s, but are slightly better because of better use of color, bookmarking, and format.

Competitor C

Competitor C's documentation fills an interesting niche: they're going for minimalist, spare documents with a fair amount of success. The description that kept coming up for us was "short, snappy, effective."

Competitor D

Competitor D trails the pack with dull, mediocre documentation. It is uninspiring, colorless, and turgid.

S.O.S. vs. competition analysis

Our analysis has shown that the S.O.S. documentation is very usable, but it isn't nearly as inspiring as it can be. It does not convey the most important message: that **S.O.S. products are the best anyone can buy**. S.O.S. products are the best anyone can buy, so it's important that every part of the products reflect this message.

The good news is that improving the message in the documentation can largely be done with better document design and formatting, which is largely a matter of creating better templates and documentation styles, which tends to be a one-time cost rather than an ongoing cost, regardless of the tool used to create documents.

Best documentation: Competitor A

It should be noted that the best documentation in this field is not produced by S.O.S., but by Competitor A. Their documentation is better than S.O.S.'s in every way.

How are they doing it?

We don't know the ratio of writers to architects or what their writing process is. We would therefore recommend that former Competitor A employees (such as Samuel Snape and others) be tapped for information about the size of the documentation team there and which tools they are using.

(HR may be able to identify former Competitor A employees and it's probable that some of the people we know came from there know of other S.O.S. employees who used to work there as well.)

Learn from their design choices

In addition, we recommend that Documentation management and the writing team look at the formatting and design options that make the Competitor A documentation good and identify which of these will be easiest to implement.

Recommendations

This section describes the recommendations for actions to be taken to resolve the problems identified by our research.

SAVINGS AND IMPROVEMENTS

- *Eliminate the DITA toolset.*
- *Eliminate printed documentation except where necessary for regulatory compliance and customer demand.*
- *Eliminate translations on higher-end/lower-volume products except on demand.*
- *Partner with a third-party vendor who produces "how-to" video clips about products.*

SHORT TERM INVESTMENTS FOR LONG TERM RETURNS

- *Start several junior writers with the Documentation team.*
- *Move the Documentation department under the product lines.*
- *Work with a technical consultant to review what can be salvaged from the DITA toolset and how to maximize the value of the reversion to [authoring tool].*
- *Move datasheets back to marketing.*
- *Identify the features of competitors' documentation that are currently better than S.O.S.'s and incorporate these in S.O.S. documentation.*

NOTE: Information on the high-level steps for implementing each of these recommendations is provided in the next section, entitled *Implementation Guidelines*.

Introduction

Our research shows us that S.O.S. should do the following as soon as reasonably practical. The pros and cons are listed in the detail for each recommendation.

The following changes will improve productivity and substantially reduce documentation costs.

Eliminate the DITA toolset.

☐ Stop using the DITA toolset. Revert to [authoring tool] and produce documentation using [authoring tool].

Pros: Will speed up documentation production considerably, improve writer morale, and eliminate the cost of Herman Patil's time on this project.

Cons: Eliminating the DITA toolset will require a reversion strategy to ensure a smooth transition back to [authoring tool]. There may also be a one-time impact for translation costs as part of reversion. (This must be assessed by a technical expert.)

Comments:

No one at S.O.S. has the skills to create a reversion strategy. This will require a technical consultant familiar with [DITA tool] and [authoring tool] who can address the specific technical issues in reverting from [DITA tool] to [authoring tool].

At the recent LavaCon conference for technical communications and content management consultants, we were able to find one vendor with these two skillsets. We have attached information in the appendixes for Oberon, a technical consultancy certified in both [DITA tool] and [authoring tool]. Although we have not worked with Oberon before, we believe that they have the necessary skills to provide a clear, effective plan for mothballing/eliminating the DITA toolset and reverting to [authoring tool]. They can also provide recommendations on what can be salvaged from the DITA toolset and provide options and timelines for what could be done in the future.

We have no investment nor financial interest in S.O.S. choosing Oberon, but our discussions with Oberon (they are under a full written NDA for this project so we could discuss some of the technical issues) suggest that they could do a very good job of analyzing and reporting on the hard technical issues.

Eliminate printed documentation except where necessary for regulatory compliance and customer demand.

☐ Switch from printed documentation online documentation except where printed documentation is necessary for regulatory compliance or customer demand.

Pros: Will save ~$1M/year in printing, freight, shipping, storage, inventorying, and disposal. Will give writers an additional couple weeks of writing time because materials do not have to be shipped to a printer, reducing likelihood of missing a product launch deadline.

Cons: There may be some pushback from customers. Some documents must be printed to meet regulatory or country requirements.

Comments:

According to Brad Cooper, it's unlikely that there will be any significant pushback from customers. His VOC data says that there is a strong generational difference and that the age level of customers who prefer to have printed manuals is fairly high. (Moreover, as Brad Cooper put it, "They don't buy new stuff anyway!")

It is possible that there may be pushback from purchasers of very high end equipment, who may feel that because they spent $250K or whatever, they're entitled to a printed manual. In the unlikely event that this happens, S.O.S. could offer a print-on-demand (POD) manual for $50 or $100. Alternatively, it would be worthwhile in these rare cases to just have an admin print a copy on a laser printer, put it in a binder, and ship it. According to Mr. Snape, who has done something like this at Competitor A, S.O.S. can expect very few people will request a printed manual.

S.O.S. will not be able to eliminate 100% of printed documentation. Most safety documents, for example, must be printed. Quick-start instructions and all-in-one posters need to be printed or they have no purpose. There are also some requirements for printed documentation for Japanese versions of products. These documents can be identified in advance and provisions made for printing them.

Eliminate translations on higher-end/lower-volume products except on demand.

☐ Documentation is currently translated into whatever languages are supported as soon as the English source documentation is available. It may save a fair amount of money on high-end/lower-volume products to translate only as necessary rather than automatically.

Pros: Savings on translations are highly variable, depending on the individual products, the total number of products, the number of languages not translated, the sizes of the manuals, and how much new material needs translating, but it's quite plausible that this method could save $150K-$200K/year or more. Additionally, if translation costs are being assessed to a product's bottom line, this could also result in a better ROI for some of the higher-end products.

Cons: Translated manuals may not be available for marketing/sales purposes before the fact. Possible increases in time spent managing translations by writers.

Comments:

The methodology for this is as follows: Sales determines which products are meet reasonable criteria for doing on-demand translation for. The factors are:

- Long sales cycle
- Products that are not "off the shelf"
- Products that typically don't sell in many different languages

When the Sales team is getting close to a signed contract, they can request translated documents for a given documentation set. If this is done a month out from contract signing and there's another 2-4 weeks before the product itself ships, this gives 6-8 weeks for to produce a translation. Translations typically take 4 weeks, so this is plenty of time to make the process work.

There are many factors that will go into this that are still to be ironed out, but the possibility of saving a couple hundred thousand dollars a year make it worth investigating further.

Add several writing interns and junior writers to the Documentation department.

☐ Add writing interns and junior writers to the Documentation department.

Pros: Interns and junior writers will help the writers on lower-end tasks, freeing the writers to do more complex documentation they're more capable of. Junior writers will also be able to start the knowledge transfer process from the current writing team, preserving their decades of expertise. Adding interns and junior writers may also be the single best thing to improve the morale of the Documentation department other than eliminating the DITA toolset.

Cons: This will require the company to spend money.

Comments:

The initial cost of funding several junior writer positions is strongly offset by the short-term payoff of documentation not missing NPIs. (A delay in an NPI launch of just a couple days can equal the cost of a junior writer's annual salary.) In addition, there are medium-term benefits of better quality documentation and greatly improved writer morale, and long-term benefits of knowledge transfer, overall product improvements, and greatly increased adaptability.

Interns can similarly reduce the documentation workload at a very minimal cost ($15-20/hour, typically). But even if there is no money available for interns, Danaher's policy of paying interns restricts cost-effective support. Many people are willing to work an unpaid internship at a company as prestigious as S.O.S. because it's as an integral part of becoming a technical writer – since writers need to develop portfolio experience as part of their education. If there's no budget for junior writers, the Danaher HR policy that restricts unpaid writing interns must be updated to match standard employment practices in the Technical Communications discipline.

Move the Documentation department under the product lines.

☐ The Documentation department is currently under Marketing. Move the department so that the department is under NPI and move the writers to live with their respective teams. Alternatively, keep the department management itself under Marketing, but still move the writers to live with their respective teams.

Pros: Will improve morale and provide for better overall documentation by giving the writers more interaction with their teams. Product line managers have also expressed interest in having writers come live with the teams.

Cons: May require someone in NPI for the Documentation department to report up through.

Comments:

What the writers do is part of Architecture and not Marketing. They all feel strongly that they are misplaced in Marketing. Moving the writers to NPI and/or spread out to their teams is an acknowledgement of the reality that documentation is a part of the product (which is the perception of the Documentation team and virtually everyone else we interviewed). This move will provide the writers with more direct access to their engineering teams, make the product line managers happier because they will have more immediate access to their writer(s), and provide an environment that is conducive to producing both more in-depth and use-cased based documentation.

The writers do not feel they need a strong centralized management. They have been functioning largely autonomously for some years. The writers are all superior writers who know what they're customers need. They are capable of working independently with only minimal guidance.

Move datasheets back to Marketing.

☐ Return the responsibility for datasheets to the Marketing team and possibly hire a desktop publisher or a service to handle basic layout and copyediting tasks. Alternatively, assign a junior writer to do desktop publishing as needed.

Pros: Eliminates a time-consuming task for the Documentation department, speeds up production of datasheets, and provides better layout. Frees the senior writers to work on technical documentation (which they are much more skilled at) instead of marketing materials.

Cons: Will require spending money on a desktop publisher/DTP service or on a junior writer.

Comments:

The datasheets are being worked on by the Documentation department but there is no added value. In many cases, the writers are simply acting as desktop publishers, which is a waste of their time and abilities. (There is no reuse of content to speak of.) Marketing's needs would be far better served by retaining the datasheets and either hiring a low-end desktop publisher or by sending datasheets out to a contractor or contract service. This will speed up the process of creating datasheets for Marketing and will also free the writers to do more substantial documentation tasks.

Identify the features of competitors' documentation that are currently better than S.O.S.'s and incorporate these in S.O.S. documentation.

☐ Upgrade the look-and-feel of the S.O.S. technical documentation so it conveys the message S.O.S. products are the best anyone can buy.

Pros: We have already done an analysis of competitive documentation, so the only thing that needs to be done is choosing the features to add/change and upgrading the documentation templates and standards.

Cons: Will require a small amount of committee work to determine what changes to make. May also require a small amount of expenditure for upgrading the appropriate tool's templates.

Comments:

Most of the upgrade can be done with better document design and formatting. This is mostly a matter of creating better templates and documentation styles, which tends to be a one-time cost rather than an ongoing cost, regardless of the tool used to create documents.

Partner with a recognized third-party vendor who produces "how-to" video clips about products.

☐ Get one or more third-party vendors to produce "how-to" video clips about products.

Pros: Fulfills a specific customer need, improves customer support information and may reduce support calls slightly. Requires only an investment of time on S.O.S.'s part and possibly an acknowledgement of the partnership, but no money.

Cons: No real downside. Video clips may be done in whatever order and priority the third-party vendors wish to do things.

Comments:

The customers expressed a clear desire for more video clips describing how to do individual tasks. Our research showed that video clips on YouTube produced by several third-parties get more than 10x as many views as the others. Someone in Marketing would have to contact these people, find out if they need access to any internal Architecture or Customer Support resources, and let them work. They're already doing "how-to" videos about S.O.S. products now with no money from S.O.S., so it's very likely they'll be willing to continue to doing this for no money but with S.O.S. supporting them with information.

What the producers will get is access to technical resources at S.O.S. (perhaps a gratis customer support account, for example, or access to some of the architects to ask technical questions) and the right to say that they're an official partner with S.O.S. to do these (although the opinions expressed will be their own).

What S.O.S. will get is, of course, lots of video clips that they don't have to spend their own money to create done by people who already have a YouTube following for this kind of thing.

There's no reason why S.O.S. can't approach several different people with the same offer of assistance. It's very unlikely that one person will do all of S.O.S.'s products and even if there are two people doing videos on the same product line or even product, it's in S.O.S.'s best interests to have multiple video clips available.

Implementation Guidelines

This is a checklist of the steps necessary to implement each of the actions we recommended in the preceding *Recommendations* section.

Introduction

These are the general steps for implementing each of the recommended actions in the preceding section. They will provide a high-level checklist of the steps necessary to implement each of the recommended actions. Note that these steps will need fleshing out to identify specific individuals or groups within S.O.S. and there will probably be additional steps that need to be added to accommodate specific issues that are not yet identified.

Eliminate the DITA toolset.

1. Announce that the DITA toolset will be backed out and that you are actively creating a reversion strategy.
2. Find out from writers if there are any current projects that are using DITA that could not easily be done in [authoring tool] without any conversion.
3. Talk to Ben Stillar and writers to identify what immediate issues there may be for translations.
4. Where possible, start using [authoring tool] immediately.
5. Engage a consultant such as Oberon to create the reversion strategy and identify what steps need to be taken to stop using the DITA toolset and, more importantly, to start using [authoring tool] as the tool of choice.
6. Based on recommendations from consultant, also identify what is desirable for future use of the DITA toolset and the necessary steps for dealing with this.

Eliminate printed documentation except where necessary for regulatory compliance and customer demand.

1. Announce that documentation will no longer be printed except as necessary.
2. Talk to Brad Cooper to identify any outstanding issues for product packaging/shipping. (Does he want to replace with CD of documentation, which will require additional product SKUs, or will docs be purely available online?)
3. Talk to Bernard about the immediate needs for handoff of docs for the website and how this should be handled. This will dovetail with the website initiative, but it's likely to accelerate/reprioritize some of the development.
4. Talk to Sales and Marketing teams to find out if there are any products that are likely to experience significant pushback. If there is a high-end expectation of printed documentation, consider making exceptions for specific units, but look to phase these out as well by setting customer expectations.
5. Identify with Ben Stillar, Marketing, and Sales teams which documents must be available in a printed format: safety docs, product posters, quick start guides, and any other documents. Get list for these docs to Brad Cooper so he expects these documents in printed form still.
6. Talk to writers about any logistics for development and production of online only.
7. Arrange a POD alternative for manuals if desired. (Check with Mr. Snape for how they did it at Competitor A.)

Eliminate translations on higher-end/lower-volume products except on demand.

1. Talk to Sales and the product line managers to identify any products that meet the criteria for translation-on-demand (TOD) documentation: Long sales cycle, products that are not "off the shelf," and products that typically don't sell in many different languages. (Also verify the part the translated documentation may play in the sales process: if the translated documentation is an essential part of the pre-sale process for convincing customers to buy, this idea may not be feasible.)
2. Make a list of all products that meet the criteria. Give this list to Benn Stillar and the writers and let them know that they will not do translations automatically for these manuals.
3. Distribute list of products to Sales team and product line managers. Make arrangements with Sales team that, whenever they are selling one of the products on the list, they need to be ready to request a translation into the appropriate language of the documentation when the time to contract + the time to delivery at the customer site is 6-8 weeks.
4. Track the cost of each TOD translation. Also track the additional coordination time spent by the writers and Ben Stillar for this new task.
5. At the end of 3 months, 6 months, 9 months, and 1 year, check with the Sales team and product line managers to identify any possible impact to the sales efforts or other problems with the implementation of this idea. At the same time, measure the savings of translation dollars for translations that weren't done against the cost of the time of the writers and Ben Stillar for this additional task. If there are significant costs/time added with little or no net recoup of dollars, consider cancelling the program at one year… but do give the process a full year to try it out unless there is a clear reason not to.
6. At the same times as the previous step, verify the product list of products with Sales and the product line managers. Redistribute the product list as necessary.

Note: there are many factors that could lead to the success or failure of this as an idea. Listen carefully for problems.

Add several writing interns and junior writers to the Documentation department.

1. Announce to the team that there will be interns and writers added to the Documentation department.
2. Work with the writers to craft appropriate job descriptions.
3. For interns, identify who is willing to take on interns and what tasks will be done by the interns. Set up review criteria. (Note: the technical communication instructors at PSU can provide basic review criteria.) Make arrangements with HR for badges and whatever requirements are necessary for interns.

   For junior writers, identify which teams/efforts/projects junior writers will be working on at first. (For example, a junior writer may be assigned to do desktop publishing on datasheets, act as a general group resource for proofreading, or do many other tasks.) Also identify who will be primarily supervising this person and providing priorities when necessary.
4. Find candidates. (Note: John Hedtke budgets time for this kind of thing *pro bono publico*. He is willing to provide some assistance in publicizing internship and writing positions at no charge.) Also consider hiring from within: there may be highly qualified people with technical knowledge who've been in customer support or even in the field as FAEs who have a penchant for writing. Remember that several of the most senior writers currently in the Documentation department started as technicians.

5. Interview and hire. As interns complete their internships, also evaluate them as possible junior writer candidates.

6. As junior writers develop some basic skill in the department, have the writers develop a plan for transferring their knowledge and expertise. Have the junior writers start working with products, talking to engineers to gather technical information, and so on. The goal is to get the junior writers familiar enough with the product lines and concepts that they can write independently.

7. Provide training opportunities or incentives to the writers; for example, a junior writer may be a very good writer but be relatively untrained in electronics. Encourage them to take electronics engineering classes, get a ham radio license, or do other things that will increase their domain knowledge and give them a better understanding of the things they're working on.

Move the Documentation department under the product lines.

1. Talk to the product line managers to find out who specifically is ready to have a writer or writer(s) join the team as an active participant.

2. Talk to writers to find out how not only how they recommend the team be distributed, but also find out what functions they feel need to stay centralized and how best to do it. (The writers have the best vision of what they're doing and what they need to do to be successful; their ideas will probably be very concrete.) If it seems desirable, appoint a couple of writers to develop a plan for this.

3. Determine if the management of the team will stay under Marketing or the entire Documentation department will move under NPI.

4. Announce that the writers will be taking up residence/partial residence with teams. (Note: some team members such as Greg Peck may end up staying in the central location in Bldg 39 because they work with all the writers on their projects.)

5. Arrange for weekly regular team meetings with the whole team to identify any problems with the new arrangement.

6. Have the Documentation department manager stop in on each writer once or twice a week to maintain a sense of connectedness and to identify any concerns or issues that may arise.

Move datasheets back to Marketing.

1. Discuss with the Marketing team the idea of returning control of the datasheets to them. Identify any issues. If necessary, make arrangements to have a desktop publisher or service handle basic layout and copyediting tasks.

2. Alternatively, if junior writers are being added to the Documentation department, identify the work load necessary to do desktop publishing on datasheets. (Tip: have more than one junior writer develop skills for doing this so that no one writer is critical path.)

   The junior writers can be "on loan" to the Marketing department for this purpose. This will provide some interaction between Marketing and Documentation to maximize opportunities for skill exchange and communication.

Identify the features of competitors' documentation that are currently better than S.O.S.'s and incorporate these in S.O.S. documentation.

1. Form a committee to evaluate the look-and-feel of S.O.S. documentation and make any necessary revisions to it. This committee should contain one or more members from the following groups:
    - Documentation
    - Marketing
    - Product line managers (Tip: have two different PL managers so that a new look-and-feel is not a solution that turns out to fit only one product line.)
    - Customer support.
    - If possible, also get input from third-party sales or FAE people who handle multiple products from multiple vendors. Their opinions on usable documentation may be the most valuable.
2. Have the committee review the look-and-feel of the S.O.S. technical documentation and competitor's documentation. Our initial results on this analysis have broken ground, but the best practices say that the committee should look at the documents and identify which specific features they want to incorporate to make S.O.S. customers happiest.
3. Model the new documentation look-and-feel. Run it by the rest of the product line managers, Marketing, Documentation, and Customer Support. Gather any material complaints and resolve. ("I don't like it" by itself is probably not material. "How will the user be able to find x?" is a material complaint.) Remember that you'll never make everyone happy.
4. Build the new documentation output templates. (Unless there is someone on staff who is skilled at creating documentation templates, this may require the one-time use of a technical consultant to make quick, effective templates for the appropriate documentation tools.)
5. Release the updated new documentation without major initial fanfare, but do mention with the release that S.O.S. is trying a new look for the documentation and comments are strongly encouraged. Be sure to have releases in several different product lines so that it's not just scopes or spectrum analyzers calling the shots for everyone. Also contact users of the new documentation in a few months to see how the new documentation is working out for them.
6. Make any revisions to the documentation format and templates that seem advisable based on material comments from the users.

Partner with a third-party vendor who produces "how-to" video clips about products.

1. Identify the producers of the most-viewed "how-to" clips on YouTube. (Note: we have some sample information about this in the Phase I report, but more extensive research is recommended.)
2. Have someone in Marketing or Customer Support approach these people/companies and tell them that S.O.S. likes their clips and would like to provide them some support in exchange for them doing more "how-to" clips about S.O.S. products.
3. Work out details for producing a certain number of clips or type of information. Remember that these producers seem to know their market; they've risen to the top of the views for this field on their own.
4. If possible, S.O.S. should find out what the producers of clips are getting out of it. Is this personal interest in doing this, are they making money, or is it something else? Although this won't have an immediate bearing, it is valuable information and may help to inspire other people to make clips or help S.O.S. to sweeten the deal without having to spend any money of their own.

Technical Consulting: Oberon Technologies

http://www.oberontech.com/

Oberon Technologies is a Michigan consulting firm that specializes in automated publishing and content management solutions. The company is the #1 channel partner [authoring tool] in the US. They have also done many [DITA tool] implementations, making them experts in both systems currently in use at S.O.S. They are also experts in DITA: four members of the company sit on the international DITA technical committee. In addition, Oberon Technologies has extensive experience with Adobe advanced publishing products, Quark desktop publishing software, and many other XML and desktop publishing tools.

The company has 200+ years of combined experience in standards-based publishing and has worked with more than 500 customers across multiple industries. We put Oberon Technologies under NDA so we could discuss some of the technical details with them about this consulting project and we think they could provide the technical solutions that S.O.S. needs for eliminating the DITA toolset, crafting a reversion strategy, and making informed technical choices for the future.

In addition to their extensive expertise in the products and issues S.O.S. is dealing with, we felt that the following skill sets would be of particular value to S.O.S. at this time:

- Business processes and workflows
- Legacy conversion
- Stylesheets for multiple media output
- Authoring/publishing environment

Oberon can provide extensive references and additional information about their services.

Disclaimer: We have no financial interest in your choosing to use Oberon Technologies nor have we worked with them before.

We are offering this information as part of the recommended solution for eliminating the DITA toolset and creating a reversion plan. There are other consultants available who can provide similar skill sets and expertise, but it is our opinion that Oberon Technologies is likely to be the one that you will work best with.

Oberon Vision Assessment Overview

Ensure a Successful Automated Publishing Project with Oberon's Vision Assessment

Source: http://www.oberontech.com/services/vision-assessment.html

The Need for Change

Organizations struggle with the vast amount of information being created, managed, published, and duplicated across the enterprise. Quite often, companies look to Enterprise Content Management Systems to solve their problems, only to find themselves still dealing with high costs of content production, translation and delivery, no improvement in publication quality, and the inability to meet ongoing demands for quicker publishing cycles.

Oberon has assisted many customers make the transition from current processes and systems to automated publishing solutions that deliver real value to the organization, including:

- Increased authoring productivity
- Reduced authoring and publishing costs
- Improved accuracy, consistency and relevance of content
- Quicken time-to-market
- Simplified IT infrastructure
- Lower total cost of ownership

Through our many implementations, we have found that the most successful were those where the customer and Oberon have a thorough understanding of the business drivers, project requirements, use cases, as-is process and value criteria on which success will be measured. Oberon's Vision Assessment is a proven methodology for ensuring this success.

The Vision Assessment

Oberon's experience and solutions are typically centered around standards-based software which will allow organizations to use an automated publishing approach to capture content from across the enterprise and then seamlessly store and manage that content in a content management system (or file system) so that it can be dynamically extracted and assembled according to your publishing requirements. The processes supporting the authoring, review, approval, management, and publishing of your content are highly collaborative and critical to your business. Utilizing XML and related standards is the only sure way to protect your information investment and ensure accuracy and productivity.

The Vision Assessment allows us to effectively architect the to-be process, develop an implementation roadmap and plan, and estimate costs and return on investment that will meet or exceed your needs. Our ten step Realized Value Product Development process provides you the assurance you are maximizing your investment. With this methodology we not only deliver an application that will meet your needs technically, but will also meet your company's business objectives.

Our methodology at a high level includes the following steps:

1. **Determine Business Objectives**
2. **Develop Requirements**
3. **Develop Use Cases**
4. **Document "As-Is" Process**
5. **Determine Value Criteria**
6. **Architect "To Be" Process**
7. **Develop Implementation Roadmap and Plan**
8. **Implement Solution**
9. **Test Solution**
10. **Realized Value Assessment**

The Vision Assessment addresses the first seven steps of our Realized Value Product Development process.

Conducting the Assessment

The Vision Assessment begins with a workshop to perform a cross-functional analysis of your business processes and information flow, your hardware, software and business infrastructure, as well as technical and business requirements. We then assist your team in the development of a vision for the appropriate Automated Publishing Solution Architecture to best fit your business needs.

In the workshop Oberon will interview representatives from all the teams affected by the project in order to get a thorough understanding of the following:

- Business Objectives
- Business Requirements
- Current Technologies and Processes
- Key Use Cases
- Value Criteria

Following the workshop, Oberon will analyze the information, follow up with appropriate personnel to collect additional information, and develop the Vision Assessment document. Oberon will provide your team with a document detailing all the information gathered in the workshop. The document will also detail an architecture for the "to-be" process, a return on investment analysis and a roadmap, plan and estimated cost of each phase of the implementation. Our implementation experts then review these documents with your organization, thereby providing you with a solid foundation for your future projects.

Consultant Qualifications

Resumes for John V. Hedtke and Anna Parker appear on the following pages.

John V. Hedtke

Consultant specializing in setting up and auditing documentation departments, disaster recovery and preparedness plans, business analysis, and process improvements

2171 Kingfisher Way, Eugene, OR 97401
john@hedtke.com • 541-685-5000/541-554-2189 cell • www.hedtke.com

Career Summary

- Master of written communications and award-winning author of 26 non-fiction books and close to 200 magazine articles in industries ranging from accounting software, to medical records systems, to process design
- Have written almost eight million words on software, hardware, and non-computer topics for end users and software developers
- 10 years' experience in business analysis, DR and business continuity consulting, and internal training on processes and software; 30+ years in technical communications and tech comm management.

Multidisciplinary Skills

- Business analysis and consulting
- Documentation project management
- Setting up and managing technical publications departments
- Needs and audience analysis
- Proposal writing
- Document design
- Policies and procedures

Society for Technical Communication:
Fellow, Board of Directors, and recipient of 26 regional and international C writing awards for manuals and books

Career Highlights

- Have written 26 nonfiction books and almost 200 magazine articles
- Wrote the online documentation and new user materials for AOL for Windows
- Wrote the first Microsoft manual ever to receive an "Excellent" rating in InfoWorld
- Co-founded a technical writing certificate program at a Seattle-area community college
- Featured expert in Time, The Wall Street Journal, Computerworld, and local/regional newspapers
- 5 years as a programmer/analyst on accounting and large records database systems

Experience

Consulting: Documentation department audits and setup, disaster recovery planning and procedures, process improvements, writer training, executive presentations, marketing case studies, and implementation plans.

Writing: Manuals, training materials, hardware and software manuals, APIs, SDKs, programming references, white papers, web content, blogs, and executive presentations. 26 nonfiction books and almost 200 articles on technical, business, disaster preparedness, and non-technical topics.

Training: Workshops, college classes, and teleseminars on technical writing, project planning and project management, Microsoft applications, database internals, policies and procedures, programming online forms, web security, web development, and career development.

Clients and Industries

Clients include: IBM, Microsoft, Invitrogen, Visio, Children's Orthopedic Hospital, Boeing, Alcatel, Wall Data, VoiceStream (T-Mobile), AOL, Federal Home Loan Bank Board, GTE (Verizon), CoBank, Sierra Online, Society for Technical Communication, and Carver Stereo.

Industries include: software, finance and lending, medical, health care, electronics, telecomm, multimedia and recording, programming, high-tech hardware, and infrastructure and manufacturing

Selected Consulting Projects

Consulted for a variety of companies and industries in short-term and long-term engagements:

Documentation departments: Auditing processes, tools selection, setting up new departments, selecting and training department managers, and establishing operations procedures for many companies.

Disaster recovery and preparedness: Documented server restoration and data replication procedures, wrote pandemic preparedness and business continuity plans, analyzed direct and indirect daily costs of an IT outage, and wrote documents for internal IT and compliance audits for a major mortgage servicing company. Wrote preliminary analyses for fail-over and business continuity for a major cell phone company. Created server and CD versions of a web-based graphical documentation interface for several gigabytes of classified system documentation the data center, operations, and field staff of a major cell phone company for use in an emergency.

Executive presentations: Wrote executive presentations on disaster preparedness, white papers on corporate culture and software selection for several companies.

Implementation plans: Analyzed the documentation and system needs for a 2000-user NT installation at a children's hospital.

Public information releases: Public information releases and reports for a post-quake telemedicine mission to Haiti for the DHS and the White House. Also wrote a grant proposal for the Clinton Foundation for telemedicine and restarting the medical school in Haiti.

Process improvements: Created a method for using existing, in-place technology to cut average support call time by 1.5 minutes/call while increasing customer satisfaction, resulting in a savings of 2000 new customer support representatives for a major cell phone company.

Selected Writing Projects

Designed and wrote printed and online documentation for many different products for all levels of users from beginners to system developers:

Financial and records software: Micro, mainframe, and web-based accounting, payroll, tax preparation, tax planning, and broker/financial analyst management software, and medical records systems.

Medical and health software: Gene splicing and mapping hardware and software, consulting for a hospital implementing a 2000-user NT medical software suite.

IT and client/server software: Fault-resistant e-form software, high-end factory automation management software and hardware, micro-to-mainframe connectivity software (English and German), videoconferencing/chat/whiteboard software, enterprise information portals.

Disaster planning and business continuity: Disaster recovery analyses, plans, server and WAN backup and restore procedures, pandemic plans, business continuity plans, white papers, IT system recovery instructions, employee materials, and executive presentations for several enterprise server systems.

Microsoft software: Visio, Excel, Multiplan, Chart, Office, FORTRAN.

Telecomm and communication: Mainframe telephone switching/routing software, voice mail software and hardware, cell phone fail-over/business continuity, AOL for Windows, backbone router documentation, and system networking processes.

Hardware: Installation and user manuals for laser printer controller cards, storage technology, magazine articles, marketing material, and white papers on Bluetooth, wireless, and DSL equipment, and manuals and help for cable TV field technician hardware and software.

Specialty products: Rewrote the Oregon Landscape Contractor’s Board training manual on regulations, licensing, and safety procedures, wrote assembly instructions for desktop waterfall kits, and wrote instructions for building musical instruments.

Books and magazines: 26 nonfiction books on accounting software, online documentation, shareware, online communications, disaster preparedness, and MP3s. About 200 magazine articles on high tech, business software, management best practices, and other topics.

Selected Training Presentations

Designed materials and presented training in many fields:

Software: Corporate classes in Works, Excel, Word, PowerPoint, Robohelp, FrameMaker tools, and developer classes on database development software, e-form design (for developers), web security, web development, and a voice-response application development language.

College courses: Web-based courses in documenting policies and procedures, creating manuals and user guides, and creating online help.

Business continuity: Pandemic preparedness and business continuity.

Career skills: Setting up a technical publications department, writing successful proposals, choosing software packages for your company, time management, project planning and project management, how to estimate, providing customer service online, and how to become a successful author.

Technical Skills

Word, Excel, PowerPoint, Author-it, FrameMaker, Robohelp, Doc-To-Help, MadCap Flare, FrameScript, HTML, IXGen, EZTools, Acrobat, LEX, Visio, accounting software, PaintShopPro, Audacity, LaTeX, authoring and publishing, proposal writing, curriculum development and instructional design, needs and audience analysis, project management, technical publications management, business analysis and consulting, policies and procedures, project scheduling, classroom training, CD production, DVD authoring.

anna parker

apr@aprsolutions.ca | 416.895.7195 | ca.linkedin.com/in/aprsolutions | @aparkerrichards

Content Strategy Consultant

With 15+ years as a technical communicator with flair for leadership, design, and rhetoric, I'm a master at developing intelligent (or smart) content, unified content strategies, and customizing materials to influence target audience behaviour.

Adept at strategizing and directing teams to define requirements, gather, assess, and distill user context and desired outcomes in order to produce appealing educational programs, marketing materials, documentation, online help, multi-media presentations, and other customized information solutions, using current tools.

Summary of Management Experience and Professional Activities

Seneca College School of English and Liberal Arts
Chair and member of Advisory Committee for Technical Communication Certificate:

Liaison between the College and industry and between the College and the community.

- Identify industry trends and shifts in the skills and knowledge graduates need to meet employer requirements.
- Advise on the need for new programs and participate in their development and quality assurance.
- Assist in identifying industry resources, including guest speakers, field placement, and co-op and graduate employment opportunities.

STC Leadership Program Chair: In 2012, with minimal budget, I directed the development and organization of the progressions, speakers, and topics presented, and managed the design, layout, and printing of a professional-grade full color program brochure. I obtained sponsors for the brochure, eliminating any cost to STC and successfully managed the transition from a one-day event to a new, multi-day program, that injected a renewed momentum and energy into the leadership. Targeting same success for 2013.

STC Toronto President: During a time of international and local process change, I improved communications by introducing new programs and a procedures handbook that we shared online, leveraging free collaboration tools to simplify delegation of effort.

Awards

STC Community of Distinction Award, 2012: Awarded to STC Toronto for successful effort to expand student member voting rights, development of an impressive Community Handbook, and cooperative and collaborative efforts to reach out to other chapters and new sponsors, all of which serve as examples of going above and beyond in serving members and representing the best efforts of the Society to build positive impressions.

STC Community of Excellence Award, 2011: Awarded to STC Toronto for dynamically enhancing your community's organization, extending member services, promoting technical communication career opportunities, and using multiple meeting formats to engage your community.

STC Pacesetter Award, 2010: Awarded to STC Toronto for streamlining operations, clarifying offerings that provide value for members, and moving toward financial self-sufficiency.

STC Toronto Tech Pubs Award of Distinction and Best in Show and International Award of Merit, 2010:

SaskTel/Retail-IT POS and Bill Payment System Training Guide used for customized train-the-trainer classroom training and sales associate training facilitated by trainers, on site at retail outlets throughout Saskatchewan.

Experience

INFORMATION MAPPING CANADA: DIRECTOR, STRATEGIC ALLIANCES & BUSINESS DEVELOPMENT (2013 - 2014)

Information Mapping® is an international, research-based writing method that enhances clear and user-focused information. They provide training and professional services in their standardized approach to structured writing.

- Led strategic alliances and partnership initiatives with thought leaders and vendors within the Technical Communications market space and nurtured relationships with the global Information Mapping community.
- Developed and managed marketing communications, collaborating with cross-functional internal teams.
- Business development activities included: managing a portfolio of accounts, using contacts to generate new business, engaging in project management duties, delivering presentations, and nurturing good relationships with clients.

SENECA COLLEGE SCHOOL OF ENGLISH AND LIBERAL ARTS, PROGRAM COORDINATOR AND PROFESSOR

Program Coordinator of Technical Communication Certificate (2012 – 2013)

Worked with administration, support staff, faculty, and students to align with the key principles of Seneca's academic plan, which included:

- Inspiring cross-disciplinary, networked learning
- Committing to a new set of core literacies
- Offering high quality, relevant programs and pathways
- Committing to teaching excellence, and
- Advancing partnerships, applied research and outreach opportunities.

Professor of Technical Communications and Business Writing courses (2011 – 2013)

TCN 807, TCN 701, EAC 397, EAC 392, EAC 394, SES 391 (links to brief course descriptions)

SOCIETY FOR TECHNICAL COMMUNICATION (STC) TORONTO, PRESIDENT (2009 – 2011)

Non-profit organization providing professional development on tools, trends, and methodologies in technical communications

- Directed the vision of STC Toronto with a focus on change management, expanding the professional network through business alliances, and striving for innovation through member/leadership collaboration
- Succession planning and leadership restructuring; spearheaded development of policies and procedures handbook to facilitate change management required to sustain STC Toronto's new 5 events/5 socials program model
- Chaired monthly community council meetings and directed 15 portfolio managers—guiding them to define and meet their objectives, which is challenging in a volunteer role
- Spearheaded and maintained Ontario non-profit incorporation and bylaws revision and reporting process

QUALICOM INNOVATIONS INC.: CONSULTANT (2008 – 2011)
SENIOR TECHNICAL WRITER, INSTRUCTIONAL DESIGNER AND TRAINER, MARKETING SPECIALIST

IT consulting services, custom development, and software solutions

- Using MadCap products, developed online help, user manuals, and product demo for the SaskTel Point of Sale and Bill Payment System, Qualicom's enterprise caliber retail solution, which reduced ongoing effort and cost to update materials and produce documentation for other clients
- Designed, developed, and delivered customized train-the-trainer and sales associate training which garnered formal commendation from the customer and the training guide won an international STC Award of Merit
- Worked with designers and programmers to enhance the Retailarc user experience
- Led three people and developed a marketing campaign strategy and collateral for Retailarc Single Store that includes a revamped website, videos, demos, scripts, materials, environment preparation, bulletins, brochures, flyers, sales kit materials; also guided business analyst in requirements development

SIEMENS ENTERPRISE COMMUNICATIONS INC.: PRODUCT MANAGER, CHANNEL SUPPORT (2000 – 2007)

Developing applications designed to offer presence-enhanced first contact resolution for contact centres

Product Manager, Channel Support (2003 – 2007)

- Managed product change request/requirements documentation process from initiation to realization and communicated releases with customer teams
- Designed, developed, and managed content, design, and updates of contact centre software implementation framework—directing sales and implementation roles to critical pre-sales, consulting, and installation job aids, thereby improving sales and facilitating more efficient product implementations
- Supported direct and indirect channels by phone and by managing the Global Community knowledge base

Technical Training Developer, Team Lead, Professional Services (2000 – 2003)

- Designed, developed and delivered Custom Reports training solution—involving travel to customer sites
- Created baseline end user training for product implementers to use for contact centre customer training
- Developed custom technical information packages for professional services experts, requiring specialized information to develop integrated custom tools/solutions
- Designed, developed, delivered, and mentored team member to deliver Employee Product Orientation Training
- Developed and updated product documentation and online Help using FrameMaker and ForeHelp, and then participated in migration to RoboHelp

SYMCOR SERVICES INC., TRAINING SPECIALIST (FEBRUARY 2000 – SEPTEMBER 2000)

Financial processing services providers, supporting major banks and retail and telecommunications companies in Canada

- Worked with directors and senior managers to identify soft skills training needs for team members and then customized and facilitated appropriate sessions, addressing the defined needs
- Procured effective training solutions and fulfilled training requests and needs by establishing close working relationships with contacts in major training companies
- Revised, edited, and rewrote UT1000 (cheque processing and imaging machine) training materials and provided direction, resources, and mentoring to staff working on other documentation projects

THE ROCKLEY GROUP INC., TECHNICAL WRITER/CONSULTANT (MAY 1997 TO JANUARY 2000)

Single sourcing content development contracts with Inco, OMERS, Environment Canada, and Sunlife Canada

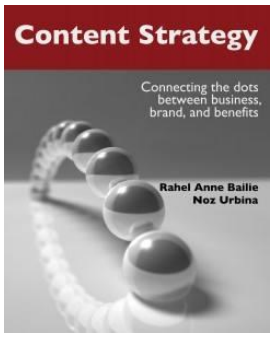
- Revised the corporate Web site, put corporate newsletter online, and delivered Introduction to HTML workshop
- Performed project research, planning, development, monitoring, and mentoring for co-workers and clients
- Led team in writing single-source Windows Help, online user guide, and classroom-based training materials at OMERS
- Designed and produced manual content and artwork for cover of Environment Canada product user guide
- Wrote training materials for Sunlife Canada for training their agents in Notes Mail, and then converted same training material online

Education

Co-op Joint Honours Bachelor of Arts (BA), English – Rhetoric and Professional Writing and Recreation and Leisure Studies – Co-operative Program at University of Waterloo (1997)

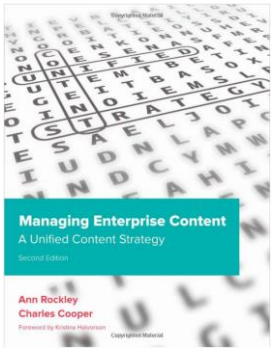
- INBOUND 2014 – Hubspot-oriented best practices for content marketing and networking (2014)
- The LavaCon Conference on Digital Media and Content Strategies (2011 to present)
- STC's Technical Communication Summit (2009 to present)
- Master Certification Course with Jeff Sutherland – Scrum, Thornhill, Ontario (2005)
- Project Management for Trainers Workshop with Langevin Learning Services, Toronto, Ontario (2003)
- Zenger Miller Certified Soft Skills Trainer with Achieve Global, Toronto, Ontario (2000)

Bibliography



Rahel Anne Bailie and Noz Urbina, *Content Strategy: Connecting the Dots between Business, Brand, and Benefits* (XML Press, 2012)

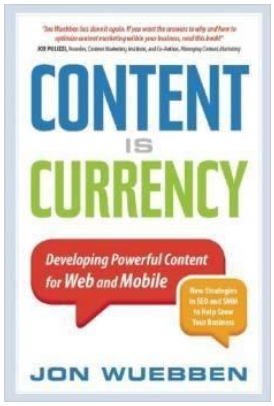
This book focuses on knowledge needed by project managers, department heads, and other decision-makers who find themselves in the position of needing to know about content strategy.



Ann Rockley and Charles Cooper, *Managing Enterprise Content: A Unified Content Strategy, 2nd Ed.* (New Riders, 2012)

Today users and readers expect to be able to have access to the information they want at any time, on any device.

This second edition shows how a Unified Content Strategy can help you deliver your content to your customers (wherever they are, no matter what device they are using) in a cost effective manner.



Jon Wuebben, *Content Is Currency: Developing Powerful Content for Web and Mobile*, (Nicholas Brealey America, 2012)

In the digital age, content is no longer confined to the written page. Content strategist Jon Wuebben explains the fine art of content development by utilizing the latest Search Engine Optimization (SEO) and Social Media Marketing (SMM) techniques.