



"I thought management was going to be easy."

An Introduction to Information-Development Management

“Management” means, in the last analysis, the substitution of thought for brawn and muscle, of knowledge for folklore and superstition, and of cooperation for force. . . .

—Peter Drucker, *People and Performance*¹

Managing information development has never been simple. Information-development organizations are frequently orphans looking for a permanent home. In many high-tech companies, information developers work within the product development structure, reporting either to product teams or other business units or to a central development organization. In other companies, information developers report to more senior managers in marketing, marketing communications, operations, or customer support and service. In service-oriented companies and nonprofit organizations, information developers report into diverse management structures, often associated with human-resources management or operations. In many of these structures, senior managers have little knowledge, and sometimes little interest, in what information developers contribute to the organization or what they might contribute, given an effective managerial direction.

¹ Peter F. Drucker. *People and Performance*. Burlington, MA: Butterworth-Heinemann, New edition, 1995.

Despite the difficulties they face in winning respect and appreciation, information-development managers are generally quite adept at focusing on the details of developing publications and meeting deadlines. I often hear managers say that they never miss a deadline. They believe in the necessity of getting the information products out the door, usually on the same schedule that products are released. Meeting development schedules requires a devotion to project management, especially the task of estimating and staffing each project so that it is done on time and with the level of quality demanded by the customers and the organization.

At the same time, I believe that information-development managers must be equally adept at strategic management. The portfolio of projects is often more than can be done with quality by the existing staff. That means making hard decisions about the priorities of projects and how many resources should be devoted to each project. It also means being constantly alert to opportunities to pursue a minimalist agenda, providing only the content that users need to achieve their goals. It means pursuing content management and reusing content among related deliverables. It means striving toward a higher level of process maturity and ensuring that staff are well educated and directed toward both efficient performance and the development of effective, customer-oriented information.

If you don't already have enough to do in running an efficient and effective organization, you are responsible for reporting to your senior management and educating them about the value provided by your organization. You must develop strong professional relationships with peer managers in your organization, including those in engineering and software development, education and training, service, marketing, sales, and any others who affect customers and might benefit from your support and collaboration. You must develop your own staff, focusing on building skills and knowledge, as well as investing in the activities that bring the highest value. You need to be alert to changing strategies, especially as you move into a collaborative work model that includes global teams and outsourcing. You must be skilled at bringing together team members who are geographically distributed or who come from companies acquired through acquisition and merger. You may yourself lead a team that becomes part of another organization and be required to adjust your business methods to accommodate changing expectations.

If you are a new manager, you have much to learn about managing information development and supporting your organization's recognition as a key contributor in a larger organization. I highly recommend learning from more experienced managers by joining organizations that specialize in information-development management or provide access to a community of managers. The Society for Technical Communication (STC), the Professional Communications Society of the IEEE (IEEE-PCS), and The Center for Information-Development Management (CIDM) all provide opportunities for new managers to learn their art.

If you are an experienced manager, you have the opportunity to share your expertise with newcomers and to become part of the community of information-development managers that is growing globally. By taking part in conferences, workshops, and electronic communities, you can not only provide information yourself but also learn from the experience of others.

I hope that you view your development as a more mature and secure manager with enthusiasm. Although you may experience pitfalls along the way, the journey is rewarding.

When your organization is recognized for its contributions and you are viewed as an effective leader, you have succeeded not only in advancing your own career but also in building the profession as a whole.

Best Practices in Information-Development Management

In each chapter of this book, I have included a set of best practices for managing information development in your organization. Some of the best practices are focused on how you manage your organization as a whole, beginning with an examination of your organization's process maturity. Some are focused on strategic planning, allowing you to manage your portfolio of projects effectively. Some of the best practices are focused on the management of projects, ensuring that you develop and deliver the information that your customers most need and that satisfies the requirements of your particular business environment.

In this chapter, you learn about the importance of your own management role and those who assist you in that role, whether inside or outside your own department. The best practices in this chapter help you form an understanding of overall strategy with regards to information development. They help you better serve the needs of internal and external customers and employ tactics to ensure that you are delivering information in an efficient and cost-effective manner.

The four best practices in Chapter 1 introduce you to the four themes you will find throughout this book:

- ✓ Understanding your many roles as an information-development manager
- ✓ Recognizing the need to build a mature organization
- ✓ Developing an information-management strategy
- ✓ Ensuring that your projects are managed efficiently and effectively

The best practices in this chapter provide you with an introduction and overview of the issues I discuss in more depth in the subsequent chapters.



Best Practice—Understanding your many roles as an information-development manager

As an information-development manager, you have many responsibilities to your organization, your profession, and yourself. Each of these responsibilities represents a unique and challenging role that you assume when you join an organization. As the organization itself changes, your roles change with it.

In 1994, in *Managing Your Documentation Projects* (Wiley 1994), I divided the roles into four critical areas. They are as relevant today as they were at that time with a bit of modification.

Your four key roles, illustrated in Figure 1-1, are

- ✓ communicator
- ✓ resource manager
- ✓ leader
- ✓ visionary



Figure 1-1: The many roles of the information-development manager

As a communicator, you are responsible for keeping the lines open to your senior management, to peer managers throughout the organization, and to your team members. A central goal of your communication activities should be to develop an understanding of and support for the information-development process and the information products you produce to meet customer needs.

As a resource manager, you are responsible for ensuring that your staff is able to meet the demands of your projects and engage in activities that advance the maturity of your organization and introduce new, innovative practices. You are responsible for prioritizing the portfolio of projects that your team manages and ensuring that you have the resources to meet the requirements of deadlines and quality.

As a leader, you need to be thoroughly engaged with your team members and understand their activities. You cannot stand on the sidelines as an administrator but must be involved in designing and implementing effective processes, information architectures, and tools. You must know how your customers think and learn so that you can guide your team to meet their needs with new ideas and best practices.

As a visionary, you need a clear picture of what you want your organization to become, one that is carefully aligned with the business objectives of your larger organization. You need to understand and appreciate business goals and objectives so that the work of your organization is never viewed as merely clerical. You need to communicate your vision of what your team can provide effectively to the decision makers.

Develop as a middle manager

When you were hired as a departmental manager or you moved into a management position from another position in the same organization, you took on the responsibilities of middle management. You report to a more senior manager in marketing, product development, operations, support, or some other part of the larger organization to which you belong. In that capacity, you are responsible for understanding the strategic objectives of your manager and the corporate management and translating those objectives to the day-to-day activities of your team and to the direction you set for your own organization. You are responsible for communicating corporate strategy and direction to your team members, even if you don't always agree with the strategy.

As a department manager, you also have a relationship to other managers in departments with which your team interacts. Those generally include managers responsible for marketing and selling products, directing operations in various parts of the organization, developing and testing products, providing service and training to customers after sales have been completed, and others appropriate to the role your organization plays.

You may also have relationships with other peer managers in parts of the organization that have different business directions. If the corporation has grown through mergers and acquisitions, you may build relationships to other technical publication managers or others responsible for writing operational or technical information elsewhere in the larger entities of the corporation. You may also be asked to establish relationships with managers and staff in partner organizations, including those reselling, servicing, or distributing your products or those who maintain technical information for products your organization uses, sells, services, or distributes.

Finally, you have a significant role to play with your own staff members. They may be located in the same facility that you work in, or they may be located anywhere in the world. As a manager, you are responsible for ensuring their success and engaging them in the active development of your organization's products and services.

Operate as a professional

Outside of your immediate organization, you may have other obligations to the profession of which you are a part. As a professional communicator, you may be a member of a trade organization that promotes the field. As a professional manager, you may be part of groups that facilitate communication among peer managers. You are responsible for knowing the state of the art and the best practices in your industry so that you can bring them into play in your own organization. You are responsible for subscribing to industry standards and deciding if they apply to your enterprise. You are also responsible for offering your own expertise and experience back to your professional colleagues, in the form of publications and presentations on a local, regional, national, or international scale.

You also have responsibilities to yourself for professional growth. If you have come up through the ranks of technical communicator to a management role, you have grown and changed from being an individual contributor to someone who takes responsibility for the contributions of others. You have gone from being a colleague to being the boss, which is often a dramatic change in direction.

You may be engaged in promoting education in the field, either through teaching opportunities informally in professional organizations or formally through programs at local colleges and universities. You may have chosen to lead a professional group in your community to increase your exposure to ideas and develop your management skills. You may yourself attend educational activities or pursue an advanced degree in your profession or in a related management area.

In all of these circumstances, you have a wide range of influence and responsibilities. In fact, you may feel that you are being pulled in too many different directions, each of them demanding a degree of commitment and loyalty that may be in direct contradiction to other demands. You may need to balance professional demands on your time and attention with responsibilities to family and other parts of your community. That balancing act is never easy and seems to become more complicated every day.

Handle the balancing act

One of the most difficult aspects for managers in this complex act of balanced loyalties is how to represent your senior management's goals and objectives to your staff members. This part of the balancing act is made more difficult if you have moved from individual contributor to manager in the same organization. Former colleagues are now your staff members. They expect you to maintain your loyalty to them and support their needs.

At the same time, you have taken on a role in the larger organization that brings a new set of expectations. Your management expects you to represent the larger organization to your staff even when you may disagree with the actions of that organization. You may know about plans that you cannot reveal to staff members, even though they will be adversely affected. You may have to refuse requests for funding and support that you find legitimate because you have other priorities that must be addressed first. You may have to take actions you find extremely unpleasant and face criticism from your staff for doing so (see Figure 1-2).

The best practice to consider in the face of a balancing act is open and honest communication. Your staff needs to know that they can count on you to tell them what their roles should be with respect to the larger organization. For example, you have been asked to reduce the amount of time and money spent on end-user information development in the form of help systems. Your staff has spent a great deal of time developing a help system and takes great pride in the help design and content they have created. They have even won an award for the help system in an international competition. At the same time, on-site studies reveal that the help system is not being used by the customers for whom it was intended. Their roles in their work environment, the training they receive, the low turnover, and the standard nature of the tasks may make the help system irrelevant, no matter how well crafted it may be. Your management has asked that the help be discontinued and effort put into other information needs.



Figure 1-2: The management balancing act

You know that your staff will be disappointed in the plans and will try to convince you to push back on management. How do you proceed?

The best practice is open and honest communication. You tell your staff about the outcome of the studies and ask them how they might react. You explain that you understand their disappointment but ask them to see the change as a challenge for doing more valued work. You explain that management doesn't want them to spend valuable time and resources on a help product that isn't meeting customer needs. You ask for ideas for new initiatives that are better aligned with what you have learned about the customers. With a combination of understanding and honesty, you communicate the message from senior management and help your team move to a new level and respond to the challenge effectively.

You face the balancing act in the other direction when your management or your peer managers ask you and your team to do work that is not appropriate. For example, consider the product developer or product manager who wants information included in the documentation that, in the best judgment of you and your staff, is not appropriate for the customers. The information may be more detailed than customers are prepared to understand or need to know to be successful. The information may be written inappropriately for the audience, with too much industry jargon or a poor writing style. The information may be irrelevant for the customer. A developer may be more interested in sounding impressive than in communicating with those who need unbiased information written in language they can understand.

Most information-development managers face this conflict continuously in their relationships with other managers and their staff members. A best practice is to clearly state your assumptions about responsibilities toward the customers. As the information developers, you and your staff are responsible for ensuring that customers are successful and interpreting their needs for information. Your organization is, in effect, the owner of the information and best situated to make decisions about content, format, and style. Although

you remain open to suggestions about the information, in the end, you make the decision about what should be included, what should not, and how the information should be best presented.

Unfortunately, you may face situations in which you have no political power to enforce your position. The CEO demands that you remove all instances of contractions in a document intended for naïve consumers who will succeed better if information is not intimidating. Despite all arguments, the CEO is adamant. In such instances, you are likely to comply with the demands although you may find it safe to register your dismay and reiterate your position as the keeper of the information.

Develop a Balanced Scorecard

You will learn more about developing a Balanced Scorecard for your organization in Chapter 3: Introduction to Portfolio Management. However, understanding how to balance the demands made on you includes knowing how to focus on a larger view of your role. The Balanced Scorecard reminds managers that every part of the larger organization is responsible for the four parts of the scorecard: financial success and profitability, customer satisfaction, effective operations, and efficient and knowledgeable employees. Best practices in each of the four areas help you to ensure that you concentrate on a strategy that will produce success.

As part of your balancing act, you need to

- ✓ understand what your organization values most so that you can ensure that the focus of your department contributes to the organizational goals. If your organization is devoted to winning market share and developing satisfied customers, your mission will be different than if your organization is concentrating on reducing costs. How you contribute to the profitability of the organization as a whole may be difficult to measure. But learning everything you can about how financial success is defined will increase your effectiveness as a manager.
- ✓ understand who the real customers are, the ones who write the checks that pay your salary and allow the corporation to meet its financial goals. You need to clearly differentiate between internal and external customers, reminding the internal customers that their needs are second to those of the people who pay the bills. You need to ensure that your team members have opportunities to know customers directly, especially with reference to their information needs. When you advocate for customers, your advocacy must be based on real information, not opinions. Your information plans must ensure that information helps make your customers more successful and helps reduce the cost of ownership of your company's products and services.
- ✓ understand that you are involved in managing both an operations and a product-development function. It's often difficult to remember that both objectives need to be fulfilled equally. You need to run an efficient organization, one that meets its deadlines and gets the information products into the hands of customers. But you must also run an effective organization, developing information products that are genuinely useful and usable. It doesn't matter much if you meet deadlines and keep costs under control, if your customers are ready to complain that they have no tools to perform successfully with your company's products.

- ✓ understand that you have an obligation to your team members that goes beyond creating a pleasant working environment. You must ensure that they grow and continue to learn and innovate. Without growing, they are likely to stagnate, doing the same thing today that they did 10 or 20 years ago. Without a focus on continued growth, your staff will descend into a clerical function that is little valued and ripe for outsourcing to a lower-cost resource. Your communication to your team members must make the priorities clear. It won't be sufficient to continue producing the same old information products. The products must change to meet changing demands in the customers' workplace and must change to compete with others who produce better information and happier customers.

Learn more about the Balanced Scorecard as you progress and develop a scorecard that you can use directly to measure your progress toward increasing your organizational maturity.



Best Practice—Recognizing the need to build a mature organization

Consider what it means to have a more mature organization. The details of the Information Process Maturity Model (IPMM) are presented in Chapter 2: The Information Process Maturity Model. At this point, you should find it important to recognize that you need a mature organization if you are to meet business and professional goals and maintain an effective and efficient department. I heard recently from a colleague that her manager discouraged her from pursuing a customer contact because they were not mature enough as an organization (as measured by the IPMM) to consider customers. The manager appeared satisfied to run an immature organization, quite possibly viewing that immaturity as inevitable.

Nothing could be further from the truth. I believe that every information-development manager should strive for a higher level of process maturity because staying as a Level 1: Ad hoc or a Level 2: Rudimentary organization invites devaluing and outsourcing. Certainly, more mature organizations at Levels 3, 4, or even 5 may be wrecked by an ignorant or malevolent senior manager, but you will find it much more likely that an organization that performs primarily at a basic operational level is at risk.

What exactly is the difference between a mature and an immature organization, and why are immature organizations at risk for dissolution or outsourcing? Overall operational quality and sustained innovation is a product of a mature organization. Although it may be possible for the individual contributors who dominate Level 1 to produce exciting new ideas and efficient methods, they do so in isolation. Level 1 describes an organizational pattern that is decidedly isolated. Individuals work independently, often prized for their ability to be unmanaged or unmanageable. They thrive on reaching personal goals with little interest in collaboration or even cooperation. Some such individual contributors may indeed be very talented and produce superb information products. Others may lack motivation, skill, and professionalism, producing lackluster results.

If you look at an immature organization from a 30,000-foot perspective, you find wide differences in quality and initiative. Everyone works for him- or herself, pursuing personal agendas and without regard for corporate objectives. In an immature organization,

I see writers continue to produce the same manuals year after year, making them longer and increasingly unwieldy. I see individuals unwilling to devote any business or personal time to learning and professional growth. I see people for whom information development is an 8 to 5 job and who basically engage in a clerical function. Of course, in the next cubicle is someone who does care about the quality of the work and continually searches for better methods to decrease costs and improve quality.

As a manager, which team member do you want working for you? If you are satisfied in managing an immature organization, you are likely not interested in organizational growth. I believe, however, that such managers are not the majority. Most of the information-development managers with whom I have been engaged are devoted to building more successful and recognized organizations. They want staff who are motivated to learn and grow the organization as a team. They prefer people who are innovative and devote time to pursuing new ideas and better practices. They build into the organization time for innovations, especially those focused on knowing the customer better.

In a mature organization, sound processes are in place, projects are well planned and managed, schedules and budgets are maintained, changes are made rationally and deliberately, and everyone knows what is expected of them. The information products developed in such organizations are designed to meet both the quality expectations of customers and the business objectives of the larger organization.

Determine your current process-maturity level

Look around your organization. Evaluate the level of process maturity that your team has achieved. Then, decide what you need to do to progress to the level you want to be. In Chapter 3: Introduction to Portfolio Management, you will find suggestions for increasing your maturity level. Look carefully at the characteristics of each process-maturity level and think about your organization. Do you have standard processes in place? Do you measure those processes to judge their effectiveness? If not, you are most likely at a Level 1 or 2.

The Software Engineering Institute (SEI), the developer of the Integrated Capabilities Maturity Model (CMMI), has demonstrated that higher levels of maturity result in significant increases in efficiency of an organization. Increases in efficiency typically result in productivity gains and reduced costs of operations. Mature organizations spend less time on unproductive activities and those that add little value to the larger organization. They spend more time optimizing those activities that meet the strategic goals of the larger organization and help to increase customer satisfaction.

If you identify your current maturity level and find it too low, you need to begin a project to improve. Improvement usually means looking closely at your processes and deciding which add clear value to customers and the business and which add little or nothing. Those that produce little value need to be eliminated or drastically minimized. Those that add clear value need emphasis and close attention.

For example, you may discover that your team members spend a high percentage of their time formatting engineering specifications and labeling them user manuals. At the same time, the team spends little or no time learning about what customers need to know. The overall value of their activities is low and easily outsourced. By shifting the team's work to higher-value activities, you not only improve performance but you also gain knowledge about customers and information design that is not easily replicated by outsiders.

Process maturity is a tool for withstanding the competition. High levels of process maturity center on

- ✓ measuring performance
- ✓ learning from your mistakes and shortcomings
- ✓ preventing the same problems from occurring again
- ✓ optimizing your performance in the future

With these characteristics in place, you can improve and gain approval for your efforts.



Best Practice—Developing an information-management strategy

Peter Drucker, noted management guru, captures the importance of an information-management strategy when he writes, “There is nothing so useless as doing efficiently that which should not be done at all.” It’s all together too easy for us to focus on the deadlines and the press of everyday work rather than to set priorities and understand what should be done. Most people, as managers and contributors, find comfort in getting something out the door. But if the document you “get out the door” is useless to the customer, you have only succeeded in increasing the customer’s level of frustration and decreasing your value to the larger enterprise.

The more information you publish that does not meet customer needs, the more it continues to cost more than it’s worth. It also allows you to be overtaken by competitors who get it right by providing the best information just in time and suited to the customer’s goals.

Having mature processes in place will increase your organization’s competitive edge, but without a strategy for information development, you won’t get the support you need from senior management. You need to develop an information-management strategy for your organization and ensure that your strategy is aligned effectively with the goals of your larger organization. The details of strategy development, from understanding budgets and customers to improving processes and encouraging employee growth and development are discussed in Part 1, “Portfolio Management.”

The core of portfolio management for information development is strategic planning. In your portfolio of work, you have a variety of projects to conduct that will produce information for product releases, update information that has changed, provide operating procedures for internal departments, and create a myriad of information types for your organization. Your portfolio probably contains more than product- or service-related projects. You may be engaged in conducting user studies, designing delivery methods such as information websites, managing localization and translation, designing instructional materials, and delivering training. Depending on the nature of your organization and your responsibilities, your portfolio may include highly diverse activities or it may be focused on producing a well-defined set of documents for internal and external customers.

In addition to the types of projects that engage your team’s best efforts, you may be involved with new activities, including developing requirements for new tools and

technologies, designing new information solutions, soliciting customer feedback, collaborating with other parts of the organization, and engaging in external professional development activities. All of these activities need to be managed effectively. But first you must decide what resources you can afford to devote to each of them. Those decisions should be governed by strategy objectives, and those objectives must be carefully aligned with corporate objectives.

Align with corporate objectives

Consider the possible objectives that may impact your strategic planning for information development. In this first case study, the emphasis is on reducing the cost of operations and the cost of goods.

ABC Corporation: A Case Study

ABC Corporation's senior management is most concerned with reducing the cost of goods for its hardware products. The manufacturing costs include the costs of technical manuals, particularly the cost of translation. Many of ABC's product lines have long histories, with 40-year-old products still being sold to additional global markets, requiring new translations. The existing product line is updated occasionally with new parts that require small changes to the technical manuals.

As publications manager, you recognize the need to reduce operational costs and to make translations less expensive. Your strategic planning centers on efficiency and cost reductions. You decide to pursue a content management solution with a seamless integration into a translation management system maintained by your localization service provider. You also decide to implement a controlled language system based on a terminology database in English so that you get more language consistency in your source documents. This strategy requires some rewriting to standardize language and a minimalist agenda to eliminate unnecessary content.

A strategic direction like this one is common in industries in which cost reductions for traditional products is paramount. In the next case study, the corporation is attempting to move into new markets and is pursuing a "best in class" corporate strategy.

TAX Corporation: A Case Study

TAX Corporation develops hardware and software in a highly competitive telecommunications market. They recognize the need to develop superior products that meet customer requirements at a lower cost than their competitors. With manufacturing locations in low-cost economies, they are able to deliver the best prices in the industry, but customers reject their offers because their technical information is undecipherable. Their strategy of having the information authored by the engineers in a local language and then translated into English by translators who do not know the technology has backfired, even if it is the lowest cost.

As the new US publications manager, you recognize that your primary task is to improve information quality for the customers while maintaining cost efficiencies. You have engineering developers whose first language is not English, making it difficult to use American writers to learn about the new products. You decide on a global strategy of developing a first-class information development team in the new country and supporting them with your writers and editors in the US.

Because you find it difficult to hire people with any technical writing experience, you focus on strong English skills and some technical training in engineering or programming in your hiring strategy. A manager on your staff who is bilingual expresses a strong interest in leading the new team in her home country. You create a mentoring relationship between your US writers and editors and the new employees, and you provide for technical training, as well as training in information development. You know you have to make a significant investment if this enterprise will succeed, but your alignment with corporate objectives ensures that you get the funding required.

Another set of objectives requires that the information-development manager set difficult priorities to identify which projects can be supported and which cannot. He is faced with severely restrictive budgets and headcounts, which means that he does not have enough people to do all the projects that the product managers would like him to support.

BIG TIME Corporation: A Case Study

BIG TIME Corporation has a wide variety of products in its portfolio. Some have been in place for years with few sales to new customers. Others are in mid-life, with updates occurring regularly. A few are the emerging stars, solutions-based products that the company hopes will change its fortunes in the foreseeable future. The product managers for every one of these products wants a large set of technical manuals that are regularly updated. You have a continually decreasing staff in the US and an inexperienced small group recently hired in a low-cost economy. Together, your team still cannot handle the workload.

As the director of information development, you develop a bold strategy in which you prioritize the products in terms of their promise for the company and in alignment with what you have learned from senior management. The top new products don't get standard documentation sets. Their users are innovators and early adopters, closely supported during installation and implementation by engineering and programming experts. These customers, you decide, need technical white papers that explain how the products work and how they can be best combined to produce innovative solutions.

The legacy products, you recognize, have very few updates and are primarily used by long-time customers with few staff changes. They are more familiar with the products than your engineering team. You decide that these products should be supported by basic files that describe the updates and present changes to procedures, but you will not update the legacy manuals at all. You assign this task to the least experienced members of your team, including the offshore writers.

continued

BIG TIME Corporation: A Case Study *continued*

The mid-range products require more attention. However, the documentation set is clearly overblown, with unnecessary marketing fluff and technical details added over 10 or more years. You create a group that is devoted to a minimalist agenda. Their first task is to reduce the volume of documentation by at least 50% if not more. Then, they will be charged with updating the newly redesigned information.

Your strategy won't make you popular with the product managers who aren't getting their usual full set of content, but without the resources to make that possible, you believe you have a viable solution. In fact, you're convinced that the minimalist documentation will be better used by the customers than the old massive tomes.

As you can see from these examples, creating a strategy plan and setting priorities does not always make you popular among all your internal constituencies. You will find yourself defending your strategy with product and marketing managers who have agendas of their own and want your attention to their needs. You should have strong senior management support for your plan to help you withstand the blast of disapproval you may experience. Nonetheless, that disapproval, if it occurs, is easier to handle than overworking everyone on your team to the point that they quit or producing work that satisfies no one, including the customers.

I recognize that many companies do not establish a strategic direction for making decisions even at the highest level. Projects are funded because their advocates are strong politically and make the most noise, even when the projects seem unlikely to produce positive or profitable results. Projects are canceled because their advocates move on, leaving them with insufficient political support. If you find yourself in such a situation, in which you are constantly fighting to respond to rapidly changing priorities with too few resources and too many demands, you will find that setting your own priorities is even more critical. If you were in a well-managed company, the priorities would be clear from the first. In a poorly managed company, you need to set priorities on your own to enable your team members to be successful.

At some point, you might consider the "nut grass" story. We were living in West Texas and battling an influx of nut grass in our backyard. Nut grass has dagger-like spines that penetrate children's sneakers easily. Nothing we did seemed to help. Finally, we had an opportunity to have dinner with old friends who had been in West Texas for many years. Much to our surprise, Al remarked after hearing our plight that he knew how to get rid of nut grass. "How?" we implored. Al answered deliberately—"Move."

Strategic planning enables you to manage your portfolio to best effect. Projects that require information to be successful must come first in your planning. You may discover, for example, that a maturing product needs different information as it is adopted by more conservative customers than it did when it remained in the hands of early adopters. Early adopters might have succeeded with support from engineering or product developers and a few key white paper discussions of system architecture. Conservative customers whose purchases often move a product into a profitable position often require information resources that allow them to use the product successfully with fewer talented specialists. For insight into the roles that various customers play in adopting technology, see Chapter 5: Understanding the Technology Adoption Life Cycle.

A product information set that was suitable for advanced users, focusing on concepts rather than tasks, will be entirely unsuitable for beginning users who simply want to be told what to do. Conservative buyers expect technology products to improve productivity and reduce the worker cost, not increase it. Instructional information and quick reference devices assist mainstream users to come up to speed quickly and find the information they need to solve problems.

A strategic information plan that allows you to manage your portfolio creatively takes into account key customer differences, as well as indicators that emerge from identifying where a particular product is in the technology adoption life cycle. You will find that some information products need to be supported by high-quality processes that ensure usability, others need merely to be maintained at minimal levels, and still others need minimal information to support early adopters who are themselves defining how the product functionality will be used.

One solution does not fit all projects

An information-development manager will be most successful by recognizing that one product does not fit all. One information-development solution does not fit all environments. Multiple strategies are required to manage a diverse portfolio, especially when resources are scarce. Scarce resources must not be squandered on unproductive information products or unproductive work for any information product.

A strategy must not only define how to evaluate projects in the portfolio and decide upon a course of action but also define the information-development life cycle in terms of value to the customer. Your strategic planning should include not only the value associated with each project you support but also the value associated with every action to which your team members devote time and effort.

My process maturity assessments with individual companies often reveal that a significant percentage of the time spent by information developers has low value to the customers. Most dramatic is the time spent on formatting text for final deliverables, using desktop publishing systems. We know organizations in which a third or even a half of information-development time is spent on formatting. Although documents delivered to customers should certainly be readable, the customer rarely or ever benefits from the degree of control that fanatical page designers want to exercise on the output. The goal of a strategic plan should be to reduce the time spent on low-value activities and to increase the time spent on activities that provide substantial customer value. If you could trade the time spent formatting for time spent in customer studies, you would increase productivity among your team and add a base of customer knowledge that cannot be reproduced by an outsource organization. If you move your authors to tools like XML authoring, which move formatting to an automated process at the end of the information-development life cycle, you gain time for them to understand customers better and minimize the content you deliver. If you develop a single-sourcing strategy in which you establish a database of content that is common to all or common to many, you gain time to work closely with your training or support organizations and gain customer understanding from their experiences.

Strategic planning is a critical pursuit for a successful information-development management. It leads to more effective management of your portfolio of work and the resources you need to support the portfolio. It is the first step toward recognition for the value you and your team provide to the customers and to your organization as a whole.



Best Practice—Ensuring that your projects are managed efficiently and effectively

With a strategic plan in place and the sound decisions that follow on the goals and objectives of individual projects, you are ready to approach project management as both an art and a science. The art of project management requires that you continually explore and introduce design innovations that better meet customer needs. The science of project management requires that you control project costs and deliver effective products at the time they are required.

In Part 2, “Project Management,” you learn the details of effective project management, beginning with project initiation and planning, through estimating and tracking, and finally into project delivery and evaluation. As an information-development manager, you are unlikely to be managing each project yourself unless you have a very small organization. However, even if you do not manage projects directly, you are responsible for ensuring that the project management process is effective and followed successfully by all your project managers. You must also monitor the progress of projects so that you are able to assist in making trade-offs of resources and priorities.

In too many organizations, project management is assumed not to be an information-development responsibility at all. Projects are managed by other people—engineering project managers, subject-matter experts, other department heads, or anyone with whom writers are assigned to work. Unfortunately, when outsiders attempt to manage information-development projects, they underestimate the work required to produce effective information products. Engineering project managers routinely underfund information development or forget to include information developers early enough in a project to understand the functionality being developed. As a result, information developers often begin a project too late to be successful, especially when they might suggest improvements in product usability that could reduce the need for information. Subject-matter experts often believe that they should write policies and procedures themselves, often without understanding the needs of the information users. Information developers are brought in at the end of the project, with the assumption that their role is to correct the grammar and spelling and add the proper formatting.

If others in the larger organization believe they should manage the information-development project, they also assume that they should dictate the content to be produced. In most cases, the content to be produced is exactly the same content that has always been produced. Little, if any, innovation is pursued, because the project managers are not interested in innovations or are unaware of new developments in the field. It is far easier, if not necessarily less expensive, to maintain the status quo.

In addition, outside project management results in peculiar decisions about content, often to the detriment of the users. Developers and subject-matter experts use product documentation as a repository for all product information, including information that should have been part of the product requirements or specifications. That information inflates the content delivered to customers, increasing the volume and reducing accessibility. Much of the information that we find in technical manuals are artifacts of the product-development life cycle, providing no value to most customers.

Take ownership of your projects

The first responsibility of a new information-development manager is to reestablish ownership of project management. Even if an engineering or subject-matter project manager exists, you should always manage the information-development activities yourself or through lead writers or designed project managers in your organization.

However, if others are accustomed to dictating to information developers and getting what they want, you may face an uphill battle to establish ownership of your projects. If at all possible, you need the support of a senior management champion who agrees that time and money will be saved and better quality delivered less expensively if experts manage this part of the larger projects.

To gain management support, you must develop a business case for ownership. The best way to establish the business case is through customer information. If you can demonstrate for even one project that the information being delivered increases costs and reduces customer satisfaction, you have the foundation for your case.

Take for example the case for minimalism. In most organizations, you can easily establish that the customers are receiving information that is irrelevant to their goals. A simple review of one documentation set reveals content that has little or no customer value. Discussions with customers generally pinpoint the superfluous content and indicate what is necessary to their successful performance.

Pointing out the superfluous content or even the overly technical content is only the starting point. Add to your business case the cost of publishing superfluous content that no one needs or uses. The publishing costs might include the cost of localization and translation, printing costs, the costs of editing and formatting, and the costs of maintaining useless content in inventory. All of these costs can easily add up to significant expenditures.

If the information is also producing inferior performance, you have an even stronger business case to establish. You can establish a direct link between performance and information quality by surveying customers, tracking calls to customer service, and opening discussions with classroom trainers, installers, application engineers, or anyone else that has regular, direct contact with customers. Staff in these functions are often aware of customer productivity issues in learning and using your products effectively in the field.

CIDM members have often found that customer service and support personnel are often aware of areas where documentation is weak because it leads to frequent and lengthy customer calls. Comtech's consultants learned during one customer study that the instructions for installing the operating system on the company's computers was fraught with useless content, leading to an enormous number of service calls during installation. By working closely with the service organization and understanding the nature of the problems that customers were experiencing, the Comtech team was able to restructure and rewrite the installation procedures and virtually eliminate the service calls in that area. The cost savings were spectacular.

After collecting the information you need, use it to build your business case for making your organization responsible for managing information development and making the best decisions about the content that customers really need. Present your business case to your senior management to win approval. If you can show that cost savings will occur and customers are likely to be happier, you usually will succeed in making your case.

Once you have gotten senior management's support, you will need to persuade the project teams that your staff works with on the larger projects. You might begin by meeting individually with each project manager for the larger teams, explaining your business case and how the new process will make his or her job easier. Stress the fact that your staff is taking on responsibility for its own work.

One presentation is not likely to be sufficient. Some project managers will be easy to convince. They are usually the ones who have already turned responsibility for publications over to your lead writers. Others will forget what they agreed to and continue to try to dictate how the information-development projects are run and what is produced. Still others will fight the process, wanting to maintain control of the content. Succeeding among the forgetful and the recalcitrant will require constant vigilance. Even after you have established your ownership of information-development projects, new product developers, marketing managers, and subject-matter experts will appear on the scene, thinking that they own the information. You will find yourself continually making the case for your ownership clear.

Perhaps the most difficult group to convince about project ownership will be your own staff, especially those who have grown accustomed to following the dictates of engineering or other project managers. They are content to take orders because it requires little thinking on their part. They also have an exaggerated view of the importance of the technical professionals and consider them more expert about everything related to the product than they are themselves. This lack of confidence is often the most insidious form of resistance you will meet among your staff.

Some of your staff will be eager to take responsibility, having wanted that responsibility from the start. They also will be brimming with ideas for improving the information and the process used to develop the information. Your role will be to ensure that their ideas are in keeping with your strategic direction and that of the larger organization.

Other staff members will have difficulty learning to push back on the stronger, more forceful developers or subject-matter experts. They have learned to do what they are told and have little confidence in their own knowledge and judgment. Perhaps the best way to support them is to provide education to bolster their confidence. Training in information design, user studies, task analysis, and minimalism can help them feel more like experts in their field and less like scribes doing what they're told.

You will have to assume responsibility for intervening in projects that are going in the wrong direction. At the beginning of the ownership transition, it would be wise to keep close watch for information developers who are too willing to capitulate. You will need to demonstrate how to push back, helping them to build confidence. You will need to provide them with the data they need to support the position that you want them to take in designing the information deliverables. You may be aided by changing tools away from desktop publishing to XML, tools that are more difficult for others to access. You may use customer studies as evidence for better decisions about content. You may focus on cost reductions. All of these tactics will help reluctant developers and writers find their footing.

In the worst cases, you may have to escalate the problem to your champion in senior management. Discussions among the more senior managers may filter down to the project or product manager level, suggesting that they make better use of their time than in dictating technical content.

Put strong project management practices in place

Strong project management practices are essential to ensuring that your team members are adequately planning and controlling their projects. By following the recommendations in Part 2 of this book, you will have an excellent, tested process for managing your information-development projects. You need to ensure that everyone involved in projects understands the process, even if they are not the project managers themselves. Educating team members may begin by involving them in deciding how they will follow best practices in the profession and adapt them to their particular project circumstances.

I recommend using a process-development methodology that I have used successfully with many organizations. First, outline the large process functions by identifying the primary phases of your information-development process. Figure 1-3 shows the five phases of a project identified by one organization.

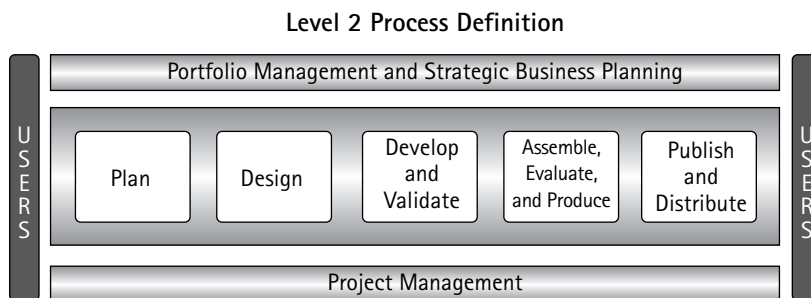


Figure 1-3: The five phases of information-development projects

For each of the five or so phases you have identified, define the primary goals and activities that take place. For each of the primary phases, add more detail. Typically, a phase will have four or five basic functions that must be performed. In Figure 1-4 you see the breakdown of the Planning Phase of a project.

Finally, develop a swimlane diagram for each phase that shows who performs each activity and what relationships are required from one action to another. A swimlane diagram outlines the required actions of the information-development process in a step-by-step fashion. In developing your diagrams, you will often find the basic handoffs are not well defined and actions are duplicated that should be done once. Figure 1-5 shows the swimlane diagram related to the Project Planning Phase of the information-development process.

Documentation Process

Level One

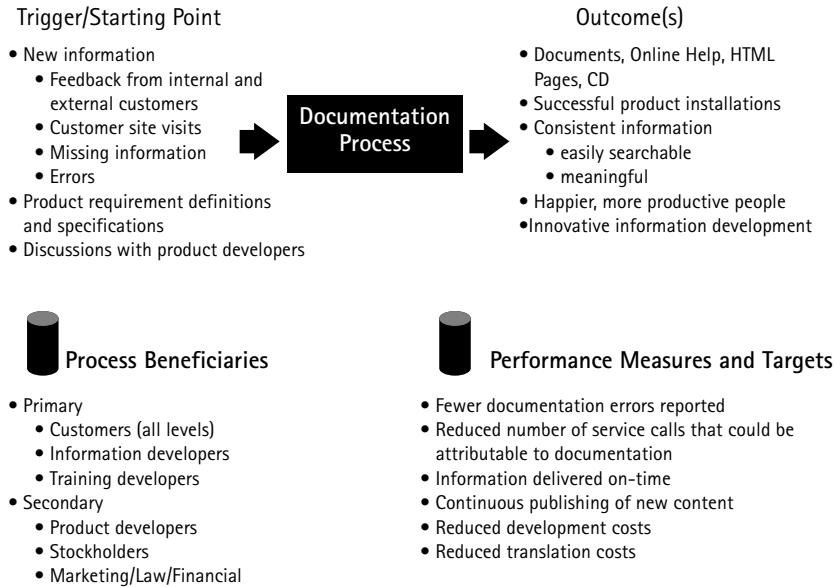


Figure 1-4: Project Planning Phase activities

Once your team members have agreed upon the process they hope to follow, ask them to test it in a pilot project. Undoubtedly, they will find parts of the process that don't work exactly as required and will suggest changes. However, be aware that many teams try to force the new process into their old ways of working. Be careful about changing all the activities to support an environment in which there is little collaboration and most writers work independently. If indeed, you want to move your organization to a more collaborative, global structure, you will need new processes.

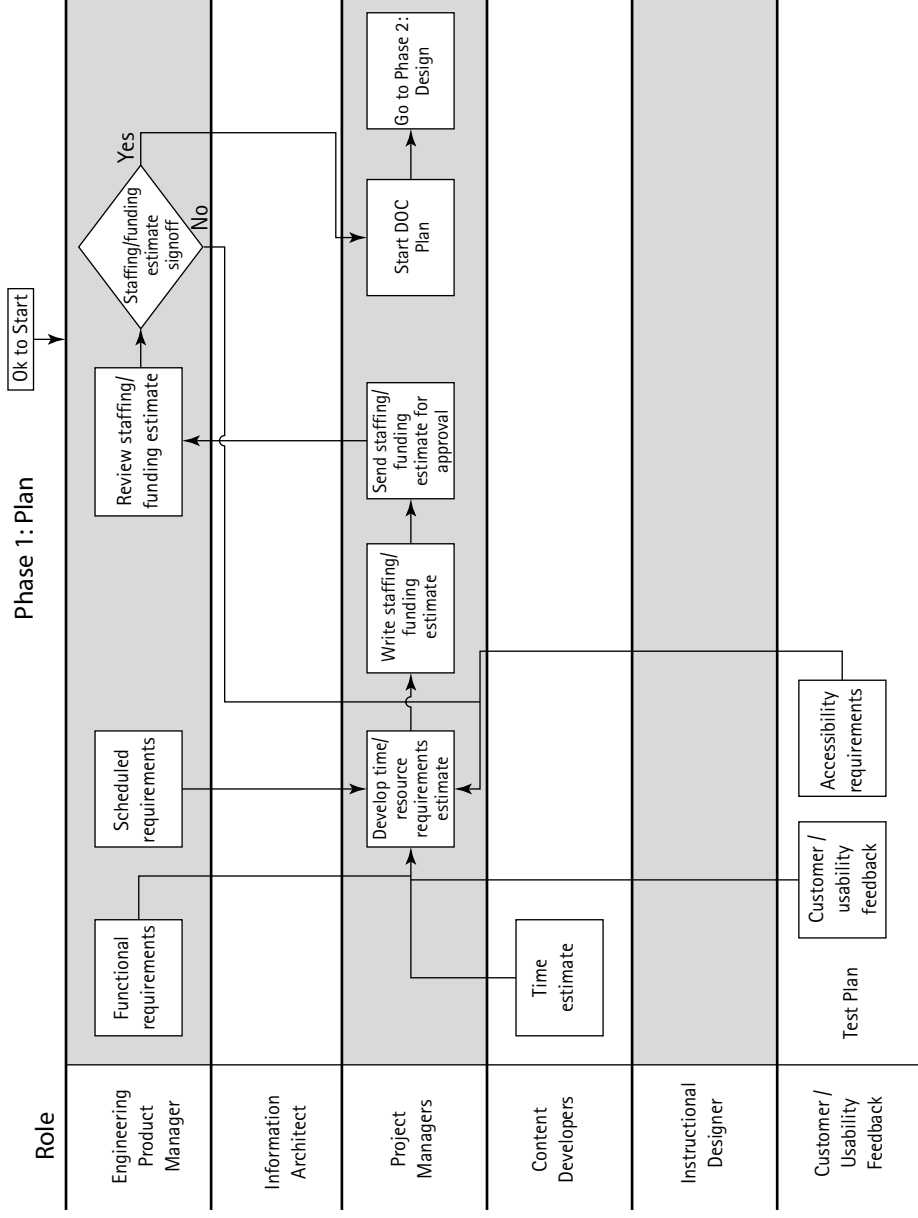


Figure 1-5: Project Planning swimlane diagram

Prioritize levels of management by project type

The swimlane diagrams usually describe the complete process that is followed for the most complex projects you conduct. They describe the “ultimate” set of activities that should occur if the projects are to be handled effectively. Some projects, however, require an abbreviated set of procedures, either because they are simpler than average or because they are emergencies.

Simple projects may include those that are quick maintenance fixes for information that is already completed and approved. They may include projects that are nearing end-of-life or have very stable information sets and an experienced user community. Such projects require fewer process steps to complete, often requiring only minimal planning and few if any design activities.

You may find it helpful to define swimlane diagrams for simple, quick-turnaround projects. Include only those steps in the process that are necessary to ensure accuracy and usability.

Emergency projects or those with very short deadlines may require yet another approach to project activities and project management. It is easy to be tempted to eliminate steps in emergency or very short projects because there is so little time. However, in my experience, emergency or short projects require more careful planning than other projects because mistakes are so damaging. Comtech has done projects that had to be turned around in less than one week, but we have included planning, design, development, and usability testing to ensure that we were headed in the right direction and able to meet customer requirements. In such a project, several steps may be done simultaneously but are done nevertheless. In a project in which we had one day to test the procedures for usability, we discovered that the procedures could not be performed at all under real-life conditions. The engineers had assumed a customer environment that simply did not exist. When we found the problem, we re-invented the procedures, called the engineer on Sunday afternoon to verify our ideas, and had the draft ready by Monday morning for review.

We often find that emergency projects are best handled with great care, but that we can often save time by reducing the number of reviewers and approvers or using a standard design pattern for the content.

Short Projects Require Advanced Planning

Comtech had a project that required a four-day turnaround for entirely new content. The project consisted of a set of instructions for parents of preschoolers setting up educational software. We had between 30 and 40 separate educational programs to document in a few days.

Planning and design were critical phases and could not be left to individuals. We met with the team working on the emergency project to define the customers’ needs and consider our approach to the content design. Then, we assigned the software to team members and asked them to try it out and come up with a design for the instructions. A few hours later, the team members met again to present their design concepts and reach an agreement about a standard design pattern. With the standard design pattern in hand, the writers were able to complete the parent instructions ahead of the deadline.

All the phases of a project are important to the project's success. Be careful about agreeing that planning or design isn't required on a project because "there is not enough time." Planning makes a project shorter and more successful rather than longer.

Consider, as you plan your variances for simple, emergency, and very short projects, what is really needed to ensure success. If you don't have time for a customer study, define the "typical" customer so that all the writers understand the requirements for level of detail and writing style. If you don't have time for testing instructions with customers, consider having writers test each other's instructions. Overlap processes rather than eliminating them. In short, find the critical path through your procedures, the path that ensures accuracy and quality in the deliverable. The steps in this path are those that are required and can never be omitted. Other "nice to have" activities that you would prefer to do if you have the time are those that are easiest to eliminate to make a deadline. You may have to accept a few less than optimal page breaks rather than sacrifice accuracy and usability.

Make time for innovation

Information developers, in my experience, can easily get into a rut of following the same processes for years and updating documents without considering their usefulness. Yet, your user communities change, the nature of the information requirements change, and you need to find ways to change, too.

Making time for innovation is vitally important to maintaining a competitive edge. That competitive edge may represent competition for resources within your own company. An information-development organization that never changes how they design and deliver information may be easily outsourced or moved offshore. An information-development organization that simply regurgitates information from engineering specifications may be easily eliminated and formatting work done automatically or given to lower-cost clerical workers.

Without taking the time to innovate, you may find your staff at risk. Innovation, however, requires decisive action. It doesn't happen by keeping heads down in the cubicles. In the IPMM, innovation is one of the hallmarks of a Level 4 or 5 organization. It requires that you plan to allow innovation to happen, and it cannot occur in a vacuum.

Some managers actively pursue funding to send team members to outside activities. Attendance at conferences and workshops can stimulate new ideas through exposure to experts and colleagues. Participation in industry competitions can provide feedback from judging panels. Hiring new staff from outstanding professional education programs can introduce new ideas to a staid environment.

Note that a Balanced Scorecard, described in Chapter 3: Introduction to Portfolio Management, has as its foundation Employee Growth and Development. Too often, however, funds for professional education and training are eliminated in budget cuts or never granted. If your department is not viewed as a professional contributor to product success and is viewed as a clerical function, you are unlikely to obtain funds for education and training. If you are viewed as an important contributor, you can argue that innovations come from knowledge of the profession, the community, and the customer.

Some managers find ways close to home to pursue innovation and bring new ideas to their team members. Palmer Pearson, senior manager at Cadence Design Systems, instituted a program within his team to promote innovation. He also sponsored an Innovation Council that brought together managers from local area companies and academic institutions to share ideas and explore industry innovations. As a result, his team members began to influence innovative thinking in their larger organization, increasing the respect that product managers and software developers have for technical communication.

Monitor project management successes and failures

You can learn a great deal from monitoring the projects in which your team is engaged. Even simple accounts of the time required to complete projects can alert you to differences that may reflect management problems. You may discover, for example, that some projects consistently take more time than others, as a senior manager in the telecommunications industry discovered when she reviewed the relative time of projects. It became clear that projects done for one engineering team were always well over budget and considerably more expensive than all the other projects. As she continued to monitor these projects, she learned that the engineering project manager was weak in planning his projects and keeping them on track, negatively affecting the information-development part of the project. When senior management learned of the cost differentials, which were supported by high engineering costs as well, they quickly replaced the project manager.

As you prepare your project evaluations at the end of projects, always ask for the difference between estimates and actuals. If certain projects always take more time to complete than estimated, you may have to revise your estimating algorithms. If some projects are always under budget, you may also have inaccurate estimates. You may find that some team members take significantly more time to complete projects than others. Perhaps their projects are more difficult technically or fraught with schedule and product changes. Or, they may be adding complexities to the projects that are not justified.

Project failures often come when team members fail to respect each other's contributions. They often are poorly planned at the highest levels, with constantly changing requirements. They are often led by people who seem unresponsive to concerns about cost overruns or unnecessary changes that are products of personal opinion rather than good project management.

Project successes come from sound planning, conscientious staff, and cooperation among all the various members of the larger development team. They come when people work together effectively and respect each other's responsibilities. Successes frequently are the product of good management. These projects are well planned, estimated, and tracked. When changes inevitably happen, the lead writers or your project managers assess the affect on the team's work and suggest ways to keep the project moving toward a sound conclusion.

Knowing the difference between failures and successes and managing for success is part of your responsibility as information-development manager. Once again, your active involvement in and awareness of the projects is critical.

Summary

No one ever told us that management is easy. As you move into information-development management and gain experience in your role, you find that you have much to learn—about managing people, projects, and the business of your organization. You play a balancing act in allocating resources, helping employees grow, introducing sound management practices, inviting innovation in your design work, and managing projects that require different approaches to be successful and to keep costs under control.

In the two parts of this book, you learn about

- ✓ managing the portfolio of projects for which you are responsible
- ✓ guiding successful project management
- ✓ ensuring that you have the tools and insights to run a professional organization that aligns with larger corporate goals

The best practices in each chapter lead you through the processes and decisions you need to make to become an effective information-development manager. Each chapter ends with a summary of the key concepts discussed in the chapter. I hope you profit from the information and use the ideas to your advantage. Best wishes.