

# Reaching Global Audiences:



## Doing More with Less

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**I**t's the personal stories that motivate us. It's the sales rep, returned from a far-flung land, who describes the geologist in a field office translating whole screenfuls of the graphical user interface (GUI) using an English-Russian pocket dictionary, or the co-workers who ask for a vernacular trans-

lation of a set of instructions because they can't get a new appliance to work. These are the stories that spur us on to improve documentation for audiences around the world.

There was a time when the decision was simply to translate or not to translate. Now, global communicators have several options:

- Translation, once considered the prime way to create user-friendly content, is now recognized as a good start but not adequate in most circumstances.
- Localization involves adjusting translated content to take into account local market and cultural conditions and linguistic and idiomatic quirks. A localized document may or may not also

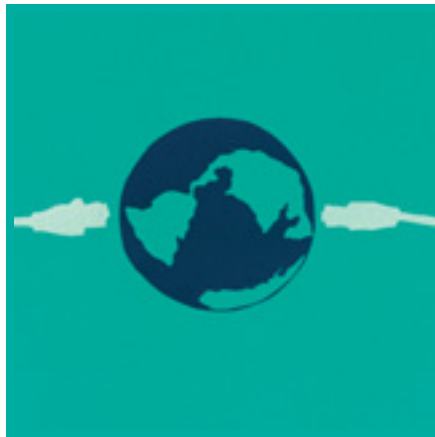
need to be translated. Localization is the most expensive option, but also the most user-friendly.

- Internationalization is the creation of the most generic single-language document possible. That document will serve all of your geographically and culturally diverse users. An internationalized document may also be translated.

Technical communicators aren't always in a position to translate or localize their documentation for all of their customers. Companies often don't have the resources to localize all their user material, or their cost/benefit analysis may put localization plans on hold. For a small company producing narrow-market software—high-priced, low-volume, and distributed globally—translating and localizing documentation and online help just isn't affordable. But small, low-budget companies *can* prepare their documentation to reach global audiences without breaking the bank.

For example, a company may choose to internationalize the material for strategic products, translate and localize key material as certain markets grow, and perhaps translate other material later on. Or a small company that produces engineering documents may choose to internationalize only, because English is the *lingua franca* of that industry. Or a company may want to mix and match these methods to reach global audiences: It may decide to translate a user guide for consumers, localize the “read me first” (because the cost for a single sheet of text is affordable), and internationalize the technical specifications (because the technical staff can work in English).

Aiding reader comprehension can take many forms, and some of the techniques we describe in this article are alternatives to language. Certainly, creating localized content is critical for certain audiences. For other audiences, we may be able to compromise by internationalizing our original documentation and incorporating non-linguistic user cues. Whatever your decision, you need to find communication techniques that work for you, your budget, and your users—something you can implement on a small scale without sacrificing quality.



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No matter how tight your budget, you can build in all sorts of user-friendly techniques to prepare your material for users in a global market. If you don't translate or localize your material, your obligation to find alternate usability techniques becomes more important for your users. We've brought together some techniques—some old, some new—that you can put into practice to reach users and make your documents more “translation ready” should you choose that route later on.

### Clean Up Your Writing

One technique that brings your writing a step closer to internationalization is to prepare it for translation. “Translation-ready” documentation (see “Is Your Documentation Translation-Ready?” by Whitney Beth Potsus and Kaarina Kvaavik in the May 2001 issue of *Intercom*) benefits users even if you never translate your material. If a translator would have trouble translating your text, chances are that non-native readers will also have trouble deciphering it. Make the English as accessible as possible for all readers.

#### *Use Simple and Consistent Sentence Structures*

Years of working in bilingual environments have taught us to consider speakers of other languages. In these environments, the instruction “Use the Phillips screwdriver to open the back of the computer” became “Get a Phillips screwdriver. Use the screwdriver to open the back of the computer.” This is an extreme, but useful, example. Break complex sentences into single-concept sentences. Readers appreciate the effort. Use consistent sentence structure and parallelism to

increase comprehension, so users can anticipate part of the sentence.

#### *Borrow from Controlled English*

Controlled English derives from Simplified English, a standard used in developing documentation across the aerospace industry. The defining features of both systems are limited grammatical rules and a controlled vocabulary. In these systems, the number of words is restricted, and no single word is used for more than one meaning. For example, using the word “list” as a verb meaning “to itemize” precludes using “list” as a verb meaning “to slope” or as a noun meaning “a series.” Adapt the principles of Controlled English to a scale you can manage, following these guidelines:

- Restrict the use of pronouns. Even when a pronoun is used correctly, a non-native English reader might misinterpret the reference. If possible, abolish pronouns from your documentation.
- Use descriptive terms in a consistent way. You can *put*, *place*, *lay*, or *set* an item down, but for the sake of your readers, choose one term and stick to it. The fewer variations a reader has to remember, the better.
- Stay away from polysemous and homonymous words. Considering many meanings of a term to determine which one you intended puts unnecessary strain on readers.
- Check for ambiguous word use. Does “with” mean “together” or “by using”? Does “as well as” mean “equally effective” or “and”? Using “since” instead of “because” or “like” instead of “such as” may be grammatically correct but

could be confusing to a user with limited English.

- Avoid gerunds. In headings, try the phrase “How to . . .” For example, “How to look up . . .” is less ambiguous than “Looking up . . .”
- Ask your translators about acronyms. Are they familiar to your target audience?

#### *Provide Definitions*

In print, define terms and jargon using margin notes or a glossary. In online documents, provide pop-up definitions, or use expanding text. In GUI, include embedded assistance written in Controlled English. Embedded assistance is still more common in Web applications than in other software programs. Figure 1 shows how embedded assistance could be used in a dialog box. To avoid ambiguity, check with your translator before using acronyms.

#### **Support User Behavior**

Academic studies tell us that users resist reading documentation fully. Because users are eager to act, they will read only until they think they have enough information to begin, so place important text at the front of your chapter, procedure, or paragraph. Always pare your writing to minimize the performance barrier presented by language. This is particularly critical for users laboring over text. The following suggestions will help make your documentation

more user-friendly for global audiences.

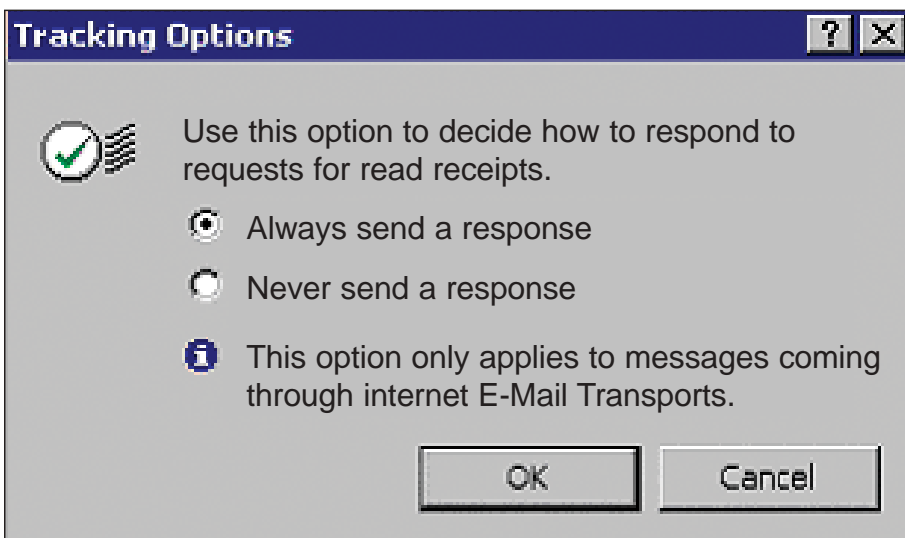
#### *Use Familiar Schemas*

Your schema—the structure of your documentation—should be clear enough that you can recognize key elements of your page (such as headings, lists, and footers) or screen even if you can’t see the actual words. To test your schema, sit back and squint at a page or screen so you cannot read specific words. Can you tell what kind of information each piece communicates? The schema needs to be familiar to readers, particularly those who may have trouble with the language. Building on common assumptions helps readers draw the intended conclusions. One example is the use of hierarchical headings, with noticeable differences in formatting between primary and secondary headings. This common technique, called queuing, draws on a well-known schema relating to the use of headings in such a way that readers can quickly see the relationship between different parts.

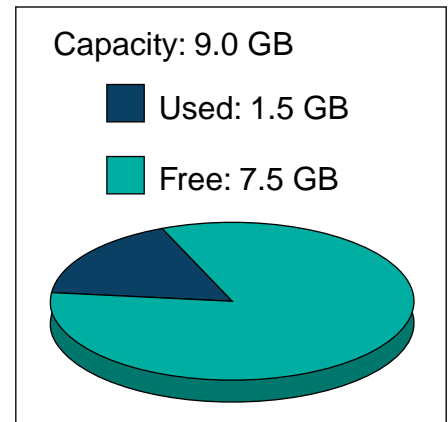
#### *Use a Given-New Concept*

This basic element of procedure writing can be a powerful technique. Build on a concept previously given, so you can present something new in a more familiar context. For example, after a procedural step, indicate what the outcome should be, then have the reader move on to the next step. The outcome is the

**Figure 1: Two examples of embedded assistance in one dialog box.**



**Figure 2: Labels, color, and shading identify and communicate information more clearly.**



“given,” setting a familiar ground on which the next step, the “new,” can be based. This practice also applies at the document level, where you build on the user’s expectation of the schema.

#### *Streamline*

Avoid naming things that don’t need to be named. For example, tell users to read the instructions on the inside of the photocopier door without mentioning that the instructions are on an adhesive label. Or simplify the phrase “Click the name of the file” to “Click the file.”

#### *Identify Information*

Be bold about labeling your information as a concept, procedure, or reference. Help your readers filter important information by using coding strategies such as putting key words in bold type or labeling diagrams. Also, be sure that illustration titles and labels are text blocks, not part of the graphic, so they can be translated without replacing the graphic. Figure 2 shows how labels, color, and shading can enhance a graphic.

#### **Improve Access**

The ways of making a document accessible vary depending on the medium. In print, we use a table of contents, index, headers and footers, page numbering, and other schematic techniques to increase user access to the information. Online, we have an expanded set of tools at our disposal. Some of the techniques described here can be applied to print,

but all of them can be applied to information on screen.

## *Provide Context*

The more explicit you can make the context, the better the chance that a user will be able to follow a task despite a language barrier. When asking a user to choose a value between one and five, for example, ensure that the user understands the order of the scale of values. Does the number “one” mean most or least, highest value or lowest value, strongly agree or strongly disagree? On screen, do users understand where they are going when they push “Back,” “Next,” or “Accept”?

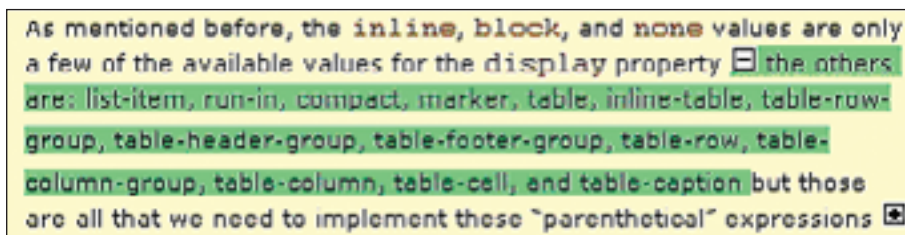
## *Constrain User Input*

You can help users make appropriate selections by constraining their choices, though building in this kind of communication requires your input at the product-design stage. A dimmed command cues users that they cannot use it: In Microsoft *Word*, for example, the “Copy” command is unusable until the user selects something that can be copied. If you can’t constrain user choice beforehand, add an error message that could help users recover from mistakes.

## *Add Multiple Browse Paths*

Browse paths are ways of navigating a document or Web site. Just as we recognize different learning styles, we need to recognize different navigation styles. Adding explicit and implicit browse paths increases the opportunities for users to find information. On paper, we already provide multiple access points through a table of contents, index, and lists of figures and tables—all to support different types of information retrieval and use.

**Figure 3: A plus sign, indicating expanding text, turns to a minus sign when clicked. Expanded text is displayed on a green background.**



As mentioned before, the `inline`, `block`, and `none` values are only a few of the available values for the `display` property  the others are: `list-item`, `run-in`, `compact`, `marker`, `table`, `inline-table`, `table-row-group`, `table-header-group`, `table-footer-group`, `table-row`, `table-column-group`, `table-column`, `table-cell`, and `table-caption` but those are all that we need to implement these “parenthetical” expressions



Online, we can provide hyperlinked cross-references, navigation bars and search tools, multiple views, buttons in dialog boxes, and rich cues such as glossary pop-ups or expanding text (shown in Figure 3).

## *Ease Information Searches*

Users find information in print documents with the help of tools such as indexes, cross-references, and numbered sections. Consistent ordering of information—for example, on multilingual instruction sheets, keeping the language blocks in the same order on every page—also eases information searches. Online, “push” technology lets us transmit specific information to users over the Web, which guides them to the information they want.

Computer support sites, such as Jaguar ([www.jaguar.com](http://www.jaguar.com)), use push technology to direct users to different sites according to their geographic location and other factors. Pushing information to users in the language they need can be quite helpful in overcoming linguistic barriers. A natural-language search tool such as *AnswerWorks* lets users type free-form questions as they search your help file or Web site.

## *Translate the Parts That Best Help User Performance*

It’s easier to read another language than it is to compose in it. If you can’t translate everything, spend your localization budget wisely to make your product more usable. For example, translate only the index. Providing your index in other languages makes it easier for users to identify and then search for key terms. They can enter search terms in their own language and be directed to the appropriate (English-language) topic.

## **Give Feedback**

The more difficulty users have with the conceptual and instructional language, the more they will look to visual cues to guide them through the GUI. If you can’t afford to translate, a good user interface becomes critical. “Guided guessing” can help users succeed at tasks. They can engage with your online information through interactive features such as rollovers, screen tips, dimmed (non-editable) menu choices, and sounds.

## *Use Instructional Design Principles*

Providing an expected outcome and an opportunity to test it gives a hesitant user assurance that the task has been completed correctly. On paper, we can do by this using introductions and summaries, which let readers anticipate and confirm an outcome. Online, we can devise methods that don’t involve reading words, such as visual cues, to indicate that a task has been completed correctly (see Figure 4).

## *Put Information into Context*

The more difficulty users have with the conceptual and instructional language,

the more they will look to schema cues to guide them through the GUI. Contextual navigation bars, such as those used on the Macromedia site ([www.macromedia.com](http://www.macromedia.com)), guide users through Web site navigation. Preview panes and **Apply** buttons, such as those used when setting columns in *Word*, give visual feedback that confirms user choices.

#### Make Best Use of Affordance

Affordance, the graphic technique we use to make a group of pixels seem like real-life objects, transcends language barriers. On screen, the mouse takes the place of our hands, and we use it to “manipulate” what seem to be objects—by pushing a button, sliding a bar, opening a door, or dragging items into a window. The user interface is easier to interpret when the objects we must manipulate appear to be 3D and give cues about their intended use. See Figure 5 for an example of affordance.

#### Finding the Right Implementation Strategy

Global communication is not just a technical communication issue, but part of the overall design activity. Making a business case for implementing a global



communication strategy without jumping headlong into the translation and localization pool may be your most effective way of getting the entire team on board. Be sure to sell your technical communication solutions to the front line, too. Present sessions to software developers on writing better error messages or improving dialog boxes, using examples from familiar programs.

Technical communicators must participate at the design stage. Develop your localization and internationalization strategies as early as possible. Attend product-planning meetings; invite yourself, if need be. Initiate discussions about terminology

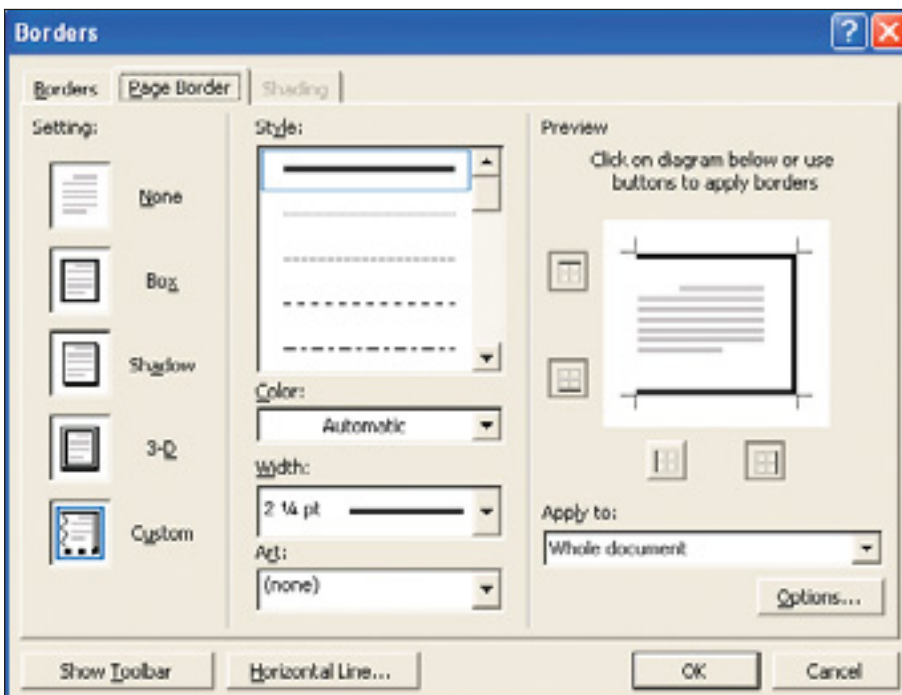
**Figure 5:** The 3D shadow indicates that users can “press” the “button” with the mouse.



and GUI, and offer to document the results. After all, you are the team member with the biggest investment in maintaining a standard. Do your task analysis before you write, and while you write, apply controlled language standards and build your glossaries. If you plan to include a search function, improve the success of natural-language search tools while you copyedit and index. You’ll need the support of developers and especially of management, and it can take a few years of banging the technical communication drum to get the message out.

The more you plan ahead and organize at the beginning of a project, the less fixing up you’ll need to do later on, no matter which approaches you use. As with most projects, incorporating your plan into the production cycle and adapting material throughout the project is more cost-effective than fixing the language in fits and starts or imposing linguistic standards later on. Determining the right approach for your project and your users will likely result in an extraordinary and flexible mix of well-designed techniques, and your audiences will appreciate the effort. Just ask the sales reps. **1**

**Figure 4:** Graphics give users immediate feedback about the implications of their choices.



*Rahel Bailie, president of Bailie Technical Services, Inc., has many years of experience creating material for users from various linguistic and cultural backgrounds. She has managed the production of translated and localized material in fourteen languages, and has led efforts to internationalize English material for global audiences. She has also produced alternative materials, such as comic books, to explain legal rights to low-literacy audiences.*

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