

Editing for International Audiences

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Companies that have embraced the global marketplace in their efforts to grow and remain competitive are constantly looking for ways to localize their products and content faster, better, and—most of all—less expensively.

Technical editors, in cooperation with technical communicators, managers, and localization coordinators, can contribute to these goals by increasing content reuse and multilingual usability while reducing volume and eliminating culturally sensitive language. Editors also need to understand the role of tools and

human processes, and how to enforce standards across their organizations.

Where We Are

In the past few years, technical communication teams have been severely downsized and simultaneously expected to work across multiple time zones. Many teams no longer include editors, and some teams do not even have time for peer editing. This situation has rendered the challenges technical communicators face more difficult.

Editors check documents for grammar and spelling errors, terminology

and consistency, and the correct application of style guides and templates. They check automated references. The luckiest are able to recommend and implement broader changes, such as restructuring content.

That said, few technical communicators or editors focus on content volume—page or topic count, graphics count, and especially word count—and it is extremely rare that editors cut content appreciably. Until recently, volume didn't matter, so editors usually weren't asked to control it and weren't used to doing so. Only once did one of my previous em-

players tell me I needed to pay attention to volume (I had inherited a 500-page book that wouldn't fit in the product box if it reached 550 pages). Now, the limiting factor is not the size of the box but the size of the localization budget.

The content that technical communication groups painstakingly create and edit (sometimes having made an effort to prepare for localization) is still far from optimized. Most technical documents are unnecessarily long and are not as prepared for the localization process as they could be.

Existing Strategies—Not Recommended

Content volume is the chief factor in the cost of localization. Companies often make desperate attempts to control volume by limiting the components that are translated. For example, a company may deem the user guide less important than the installation guide and choose not to translate the user guide. For point releases, some companies do not localize any product content (including software, online help, printed documents, Web content, and marketing collateral).

These localization decisions, which are driven solely by cost considerations, amount to product amputation. They are patently illogical for users who need the content in their own languages—and they don't support the company's global image.

Tools and Technologies

To address localization cost issues, some technical communication groups are migrating toward tools and technologies such as content management systems (CMS), Darwin Information Typing Architecture (DITA), and XML.

Language service providers employ translation memory (TM) technology, which uses databases that store the original text and its equivalent (translated by humans) in each target language. TM allows the reuse of translated segments (similar to sentences), thereby speeding up the translation process. If the segments are consistent enough, service providers can offer discounts on translation costs. For content that has multiple revisions—such as technical content—TM technology is ideal.

Other tools, technologies, and methodologies exist and are being developed, but so far, CMS, DITA, XML, and TM are the most useful for preparing most types of technical content for localization. While these solutions focus on reuse—saving some time and money—they don't address the issue of content volume.

Consider this: the time and cost savings of content with reduced or controlled volume far outweigh the benefits of reusing content.

Where We Are Going

Tools help improve many processes, but, fortunately for technical communicators, there is still a need for the human mind to make value judgments required to produce technical content (see Figure 1).

Editors need to think in terms of the big picture as well as perform granular work. They may need to eliminate useless content “limbs” and also perform content “liposuction” (through thousands of tiny cuts)—and develop strategies for both. If they don't implement these strategies while the content is still in their hands, the result will be wasteful content that proliferates across markets around the globe.

From the start, technical communicators must develop content with localization and multilingual usability in mind—and we need practical methods of achieving those goals. This requires significant changes in both our organizations and our own thinking.

How We Can Get There

Perhaps some day, technology will help us efficiently prepare content for localization, but until then, we are going to have to do most of the work ourselves. We must pay attention to areas such as content volume, usability, cultural neutrality, and coordination across teams.

Impetus for Change

Linguists, usability specialists, and others have long felt that localization is the right thing to do. But what's really driving the recent focus on creating multilingual content—especially controlling volume—is the business need to expand globally and the *perceived* high cost of localization.

Why perceived? Because over the past two decades, the localization industry has driven translation costs down about as low as they can go, and the cost of localization in most cases is a tiny fraction of the return that companies get in the target markets. Common Sense Advisory's research has found that companies that earn almost half their revenue from outside the United States “spent between one-quarter of one percent and 2.5 percent” of their annual international market revenue on localization. According to this study, one company “spends more landscaping its campus than it does localizing.”

That said, sizable budgets are sometimes needed to localize large volumes multiplied by a high number of languages. Therefore, editors must focus on controlling volume in the source

Figure 1. Strong processes need both technology and human input.

	Technology	Humans
Strengths	<ul style="list-style-type: none"> Consistency: reuse of existing information Databases / file management: storage, retrieval Source control Consistent application of rules Predictability 	<ul style="list-style-type: none"> Consistency: creating reusable terms, phrases, sentences that get put in tools Value judgments (what makes sense, is right / wrong, better quality) Creating strategies, standards Coordinating efforts for which there are (yet) no tools
Weaknesses	<ul style="list-style-type: none"> Tools manage whatever you put in; they usually do not fix what's wrong; cannot even identify what's useless, frustrating to users; too voluminous Application of rules may be too rigid 	<ul style="list-style-type: none"> Memory / retrieval within and across authors, documents, products, and time: <ul style="list-style-type: none"> Rules Terms, phrases, sentences Application of rules is often inconsistent (but uniqueness is sometimes needed)

language before the cost is multiplied by the number of target languages.

Well-established organizations often have large volumes of legacy content that was created before localization was commonplace, and the need to localize this content puts pressure on managers trying to control costs. Even younger organizations with smaller budgets and a need to localize in many languages are feeling the pinch.

Cultural Neutrality

Most technical communicators know they should pay attention to cultural issues when creating multilingual content, but many have limited knowledge in this area. Well-meaning strategies that advocate learning about other cultures and avoiding certain colors or numbers can be misleading. For example, in Chinese culture, the number 4 is considered unlucky (it sounds similar to the character for “death”), but you still have to use it in procedures that contain at least four steps. Similarly, the use of color, while important for Web sites and marketing materials, has minimal impact in technical documentation. Certainly, studying cultures is an admirable goal, but the time required to have sufficient depth outweighs business benefits. We must focus on cultural issues that affect technical documentation.

Writers don’t always avoid slang and jargon, so editors can start by replacing such terms with standard language.

Another type of cultural issue to look for, and one that can help reduce the amount of content, is the use of a conversational tone. Consider these examples:

That's it! Simple, right? You're almost there.

Congratulations! You've completed the lesson.

Some teams make a concerted effort to create friendly content, but it often doesn’t translate well—and usually creates verbosity. Editors must remember that users want to solve problems quickly, so having to read more words—in any language—is frustrating.

Multilingual Usability

We know that content should be writ-

ten based on user profiles. But technical communication teams rarely have access to solid user data (let’s hope this changes!), not to mention the fact that multilingual users are rarely consulted.

Editors can at least focus content on the data they’re able to get. For example, including a statement such as *This manual is for the beginning through the advanced user* is useless—the statement could refer to all the world’s users, and therefore, all the content that could possibly be written about the product. Instead of accepting such an unfocused user profile (which may come from product management or marketing), try getting user data from those in your organization (including offices abroad) who have direct contact with users.

What’s Next?

Of course, you can’t just chop off important information. Editors need to learn to find the fat, isolate it, and remove it methodically. Take the quiz in Figure 2 to see whether you can determine what should follow.

Figure 2. A localization quiz.

1. What happens after completing this instruction?

Click OK.

- a. Your changes are saved.
- b. The dialog box closes.
- c. Both of the above.

2. What paragraph tag comes after this introduction?

Follow this step-by-step procedure:

- a. Bullet
- b. Numbered step
- c. Heading level 2

3. In a wizard, what happens after a user follows this command?

Click Next.

- a. The wizard closes and the product’s main window appears.
- b. You enter a URL and click Go.
- c. You continue to the wizard’s next page.

Answers and Comments:

- 1. c: This is standard behavior for most any application. If the result is predictable, why document it?
- 2. b: Numbered steps clearly indicate a procedure. There is no need to tell users a procedure is coming up next.
- 3. c: Why are sentences such as *Click Next to continue to the wizard’s next page* so common? The point of wizards is that they already contain the instructions for the user. Documenting those instructions again is pure waste.

Here’s another critical point: phrases such as *Click OK* are not only much shorter than *Click OK to save your changes and return to the Configuration Options dialog box*, but are infinitely more reusable.

Industry Standards

Why does it seem to be the industry standard to include so much waste? Because that’s the way everyone else does it, the way we were taught to do it, and the way our style guide says to do it. Editors need to learn to identify opportunities for improvement and adapt to the idea that users want only the content that they actually need.

Change is painful—especially when it involves looking at how we create content. It’s easier to clinically analyze the seemingly inorganic and objective—such as tools and technologies—than our own content. When one of my students learned how the use of “all caps” created production problems in localization and made readers in some languages uncomfortable, he decided to find out why his organization used this



convention. It turns out that it had been implemented twenty-five years ago, and no one had questioned it since.

It all comes back to a cultural shift within our organizations. To address issues such as these, we have to reexamine our style guides, templates, and other structures. This takes committees (with plenty of disagreement, no doubt), consensus, testing, and time.

Quality, Quantity, or Time?

Like most people in business, editors are faced with the classic trade-off of quality versus quantity versus time. In the past, the editor's task has largely focused on quality, but time has become a much more significant factor, and the quantity of content has exploded as never before.

Accompanying these shifts in emphasis has been a boom in tools enabling reuse and increased productivity, a focus on simplicity in the field of usability, and increased attention to writing concisely. More editors are working electronically rather than in hard copy. In a few groups, editors even make volume reductions directly in files. This requires consensus, as well as integration into the team and comfort using authoring tools—trends that are growing for all the right reasons.

Though it is an editor's nature to focus on quality and details (that's a good thing), remember that overall volume and usability (that is, quality) are also related. Controlling volume serves our employer (by reducing product cost and making editors more valuable employees) and users, and reduces the

time required for localization. And just think about how much less time you'll need to edit the next revision!

Tracking Progress

We must learn to better prepare content for global users, and to do so while controlling expenses. This involves foreign languages and math—together—two things that do not come naturally to editors in general. Being fluent in another language or two is helpful, although it isn't necessary. We need to learn to avoid things (such as text in all caps) that unnecessarily hamper localization or impede multilingual usability. And it's important to track, control, and predict content volume.

Tracking volume is easy. You can count words in a Microsoft *Word* document by selecting **Tools > Word Count**. In Adobe *FrameMaker*, select **File > Utilities > Document Reports > Word Count**. After learning the type of content to avoid or delete, you can track the word count again and report progress to the management.

Editors as Leaders

Editors can lead by creating lists of acceptable and unacceptable terminology; chairing style-guide committees; and suggesting, documenting, and enforcing changes with the aid of technology.

Try to include an editor in cross-functional teams, and to have an editor coordinate terminology and phrasing across products. Quality, consistency, reuse, and avoidance of cultural issues ought to start within the product, or flaws can proliferate throughout the

source content and into the localized versions of the product and content.

Perhaps because we are involved in creating high-tech products, our community tends to believe that technology will perform miracles. Some companies invest large amounts of money in tools and expect a high ROI after a year or two; the ROI from volume reduction most often occurs in the first project. While tools are very good at enabling reuse (which helps humans—it's difficult for us to remember potentially reusable material across topics, help systems, products, writing teams on several continents), they do not, in and of themselves, create reusable topics or sentences. That requires a symbiotic relationship between humans and tools.

With their broader view across documents, products, and writing teams, editors are in a good position to make recommendations to their teams and companies. Editors should evaluate and recommend tools and lead in the development and recommendation of rules, some of which can be integrated with tool use. As many teams have discovered since moving to topic-based writing, we need to define our writing rules and strategies for reuse before implementing a technology solution. Including volume control and reuse optimization in the planning, implementation, tracking, localization, and revision processes is imperative. ❶

SUGGESTED READING

DePalma, Donald A., and Renato Beninato. *Beggars at the Globalization Banquet: Optimizing the Return on Investment of Localization in the Enterprise*. Common Sense Advisory, Inc. November, 2002.

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