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Intercom, the magazine of the Society for Technical Communication, is published to provide practical examples and applications of technical communication that will promote its readers’ professional development.

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NEW THIS YEAR: The content of more than 100 sessions was captured (audio and visuals) and will be available on the STC website (www.stc.org). Only panel discussions and workshop sessions were excluded. A free demonstration of the technology is available on the website now. SUMMIT@aClick is included in the full registration fee. Attendees will receive a password to access the content at no additional charge. Members who did not attend the Summit may purchase Summit@aClick for $795; however, until 30 September it is being offered at an introductory advance price of $595.
How Video Games May Help Eyesight

Researchers now say they may have found a way to improve contrast sensitivity naturally with the help of an unlikely source—video games. In a study published online in the journal *Nature Neuroscience*, a team of researchers describe a specific video game training regimen that could improve contrast sensitivity, helping those afflicted with the problem notice even very small changes in shades of grey against a uniform background. Read the full story at www.sciam.com.

Are You Wasting Energy?

According to a recent study (http://ase.org/content/news/detail/5487), US workers waste $2.8 billion annually in energy costs by failing to shut off their PCs at the end of the work day. What’s more, machines left on during off hours may emit up to 20 million tons of carbon dioxide (CO₂) this year alone, roughly the equivalent impact of four million cars!

Adobe and Facebook Partnership

Facebook has partnered with Adobe to make it easier for developers to bring its Flash technology to their social apps. The announcement comes hot on the heels of rival social network MySpace’s partnership with Microsoft to bring its Silverlight technology—a Flash rival—to its developer platform. Read more at http://news.cnet.com/the-social.

Touch-screen Technology

At the Consumer Electronics Show, Steve Ballmer talked about how Microsoft will put touch-screen capabilities into the next version of Windows. LG showed off a touch-screen watch. Sony hawked a touch-screen camera. Palm is betting its new touch-screen Pre can turn the struggling smart phone maker around. And Samsung introduced a touch-screen music player. Visit *Forbes.com* for a list of devices that showcase the technology.

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May 2009 intercom
THE FUTURE of Technical Communication:

BY BARBARA GIAMMONA, Associate Fellow
In August 2004, I published an extensive research article in the Society’s academic journal, *Technical Communication*. That article was the result of work I had done for my thesis project while earning my master’s degree in management. There was a considerable amount of talk about that article. When I am at STC conferences today, people still ask me about my findings. Many people are concerned that technical communication, as a unique profession, might cease to exist in a few years’ time. Others wonder if technical communicators can ever “earn a seat at the table” with senior managers of other technical roles, no matter how hard we try—even if we all go out and earn MBA degrees.

The question of the future of our profession is always a pressing one for those of us who have made a living in this field. Now that five years have passed since my original study, I thought it might be worthwhile to revisit that subject. So in late 2008, I dusted off the original survey, made a few tweaks, and sent it out again. Last time, 28 participants from several countries, many of them leading names in our field, provided me with in-depth responses. This time, eight of the original participants were on board again, along with 28 others, again representing a broad cross-section of our profession—well-known leaders, everyday practitioners, educators, and managers from across the United States, Canada, Europe, and India.

This time, unfettered by the weight of my academic obligations, I felt free to take a bit more casual approach. The questions were much the same; but the results are a bit different. After all, we are living in a different world than we were five years ago. Or are we? Let’s find out as we take a look at The Future of Technical Communication—Remix 2009.

**In Our Last Episode**

Five years ago, we were in the midst of tough times. Many people had exited the field after the dot-com bust and 9/11. Technology spending was down. Overall, we thought it was a pretty gloomy time.

From the wealth of information I gathered in 2004, here is what I concluded that we as a profession should be doing to bolster our future prospects:

**Become part of the development and innovation processes.** I concluded then that we needed to make a strong move toward inserting ourselves in the development and innovation processes for the products we support. There needed to be a clear connection in the minds of our employers between our contribution and the sources of the company’s revenue. There was no more room for the shy writer working alone in a cubicle. It was time to step up and be known.

**Launch a public relations campaign for our profession.** It was also important to make our profession better known and understood. As 2004 survey participant Ian Wright from the United Kingdom said, “Our biggest hurdle is that people are not aware of us and the value we can add to their products and services.”

**Improve our professional societies.** Recently, STC has made major strides in this area, examining every aspect of its structure, programs, and organization. At the time, though, there was wide agreement that STC, as well as other societies, were missing the mark in supporting our needs.

**Become better business people and managers.** Our basic persona—our tendency to be at once technical and artsy, introverted and quirky—generally did not make us great managers. I concluded that we required managers who are more professional. We needed to be able to “pitch
our services, make a business case for our functions and deliverables, and delineate eloquently the value we provide.”

Repackage ourselves for the future. I argued that not only technical communicators but all professionals were going to need a different set of skills to survive in the twenty-first-century workplace. Survey participants indicated that while writing would remain at our core, flexibility around how we employed that skill would be crucial.

This Time Around

If we thought times were tough five years ago, we couldn’t have imagined the state we’d be in today. Holly Harkness, a technical communication manager from Atlanta, says, “In 2003, I had five employees. Today, all my writers are part-time. I spend much more time managing my employees because they are new to the organization and don’t see themselves as members of my ‘team.’ When my old team was humming along, I was free to take on additional responsibilities such as project management and training work, but with staff reductions that isn’t possible.”

Single Sourcing and Content Management

Despite the downturn, some things that were just a promising glimmer on the horizon five years ago are indeed becoming realities. About half of the survey respondents indicated that they are already single sourcing and/or using content management systems. Cindy Frakes, a senior manager of information development from Oracle, says, “The biggest change to the way my organizations have done work in the last seven or eight years is the move to XML as an authoring source, structured authoring as an approach, and the ability to more completely automate publishing tasks, as well as the creation of metrics, the ability to automate more documentation testing tasks and delivery tasks.”

Online information delivery is surging as well. In many quarters, the delivery of paper manuals with products has been replaced by the delivery of online materials in various formats. One respondent from Michigan says, “In the old days, everything was paper-driven. Now virtually everything I do is designed to be distributed, and often viewed, online.”

Chona Shumate, a senior manager at Cymer Inc. in San Diego, whose team was an early adopter of single-sourcing and topic-based authoring, says, “My next step is dynamic content delivery (DCD). Our field service engineers (FSEs) now obtain all documentation from our intranet and store it locally for on-site use. My vision is for our FSEs to select what they need from a [set of] choices, and have the system render it right there on their laptop, instantly—providing the exact information when they need it.”

Wikis and Collaborative Tools

The concept of authoring via wikis barely existed five years ago. Yet several participants indicated that they were involved in collaborative writing efforts using a wiki today: “We are in the process of converting our field service manual to a wiki. The intent is to be able to capture the knowledge and techniques of our field service engineers, as well as to ensure the most up-to-date information is available to them in the field maintenance manuals,” says Rick Lippincott, a technical writer based near Boston.

Tools such as SharePoint and web meetings have created a virtual work world where globally dispersed teams, with highly mobile members, are creating information around the clock. “Communications technology has significantly changed how people in our organization work on a daily basis,” says Kristen Cogburn, a principal technical writer based in Houston, TX, remote from her corporate headquarters in California. “Teleconferences and WebEx meetings are now the norm, allowing projects to be coordinated and executed by team members who are dispersed around the globe.”

One side effect of the use of these technologies is the never-ending day. Cogburn says, “Work on projects runs continuously, to fill every hour possible and minimize the overall project duration. A set workday and workspace have almost become obsolete, with team members connecting virtually at any time and at any location—corporate offices, home offices, on the road in cars or trains, in a quiet corner of the dining room, walking down the street. The pace is relentless.”

Cindy Frakes says she keeps in touch with her team using a variety of these collaborative tools. “We also celebrate our successes as a virtual team by having ‘virtual’ parties, where we eat a meal ‘together’ over a conference call, or raise a glass together across the time zones. It’s important to celebrate as a team, even if it is virtual. It fosters team spirit and collaboration.”

Outsourcing/Offshoring

The outsourcing of technical communication work has been a reality for many years, especially in those companies where it is not seen as a core competency. In 2004, offshoring was only beginning to be a reality, with few success stories reported. Today, offshoring has grown, and a third option has been born—that of sending technical communication work to your own company’s facility in another country, where your organization still owns and manages the function, but your offshore employees do the work. One survey respondent from Northern California commented: “Much of the move outside the U.S. involves resources managed by the companies themselves, not outsourcing. In other words … a large percentage of offshoring is not necessarily outsourcing.”

Vici Koster-Lenhardt from Coca-Cola
in Vienna, Austria, says that in the past five years, her entire team was outsourced—at her recommendation. “As IT’s business changed, so did the role of the documentation department. When I realized that, from the company’s perspective, technical communication was not perceived as a core competency for the company’s business, I proposed to outsource the department. After nearly 20 years of staffing full-time technical communicators, the company now uses only outsourced resources.”

The marketplace for offshore writers is growing, especially in India, where the talent pool has greatly increased in the past five years. Taru Mateti is the head of documentation for Cybage, a service provider in India. She says, “Six years ago, we were a handful of writers in our company, working in isolation on different projects. Now, we are a team of more than 50 writers, with the company offering documentation as a service. With increasing demand for documentation, the significance and awareness has definitely been on a steep rise.”

Survey respondents this year indicated that they were partnering with companies in India, Pakistan, the Philippines, Hungary, Germany, China, and Canada, as well as using lower-cost marketplaces within the United States to achieve cost savings.

Conclusions Remixed
In many respects, I think my conclusions from five years ago still hold up today—with a little remixing to account for the changing times. Let’s take a look at how we stand today in those same areas:

We are becoming more a part of the development and innovation processes.

Despite hard times and corporate cost cutting, some pretty cool innovations are taking place today in our field. Figure 1 highlights just some of the innovations that are taking place in the organizations of those who participated in this survey. But are we more integrated with development and innovation overall?

Frances Gambino, executive director of Documentation Services at Information Builders in New York, says that her team’s role has changed dramatically in the past five years: “Content management has become a critical part of our company’s success. My team has recently (in the past two years) developed an internal search tool to help users navigate our internal content repositories. We are now marketing the product for our customers. From technical writer to technical system developer in five years! We are also heavily involved in digital archiving and creating controlled vocabularies to manage content searching and retrieval. [These efforts are] broadening the scope of the technical writer’s traditional role within our organization.”

I asked survey participants if we are gaining clout in our organizations. Cindy Frakes says: “In most cases, the contribution of the technical communicator directly corresponds to the level of advocacy technical communication has as a whole in the company.”

Chona Shumate believes we are gaining headway and cited an example. “As our service revenue has increased considerably, so has the attention to the field service engineers. Their needs are now very critical and tied to company balance sheets. We now have an internal customer with a strong voice in decisions and funding. They have actually become our strongest advocates.”

We still need to launch a public relations campaign for our profession.

While our profession is probably no better known or understood by the public than it was five years ago, our PR campaign today should be turned inward to our employers. The survey responses emphasized it over and over again—value, value, value—to ensure our unique role continues into the future.

Jack Molisani, president of ProSpring Staffing and executive director of the LavaCon Conference on Professional Development, had virtually the same thing to say today as he did five years ago: “What we need to be doing to ensure that our role exists going forward is the same thing we should have been doing all along: find a business need and try to fill it. To quote Andrea Ames (former STC president), become less of a ‘technical writer’ and more a ‘solutions provider.’ Ask your boss and your boss’s...
boss what problems they are having and try to solve them. Get yourself inserted into teams that are considered a profit center (not a cost center), and make yourself such a valuable contributing member that they wouldn’t even think of laying you off. Leverage your core competencies and let it be known that you’re not just a technical writer, but a corporate communication specialist, a project manager, a ______—whatever your company needs and perceives as valuable to the organization.”

We are improving our professional societies.

As you know if you have been consuming your STC membership for the past few years, STC has been in the process of extensively remaking itself in response to member feedback. As a result of much hard work, we have a new executive director, a new structure for our board, new resources for leaders, new budgeting and financial measures, a new mission statement, more educational opportunities, new membership packages and benefits, and a redesigned and improved annual Summit. STC has also moved forward on the construction of a Body of Knowledge that defines the technical communication profession. All of these changes have made STC more viable, current, and relevant to us.

Saul Carliner, associate professor of Education at Concordia University in Montreal and former STC president, says that we can use what we learn from the Body of Knowledge project to “promote our unique skills and knowledge and explain how they benefit the organizations that hire us…. For the first time, we are saying who we are and what makes us unique. It may sound abstract to the average practicing professional, but it can serve as a guide for promoting the profession to the people who hire us, raising professional awareness and quality of practice, and guiding the design of academic programs.”

We still need to be better business people and managers.

Our management skills continue to be an area of struggle for our profession. JoAnn Hackos, president of Comtech Services and former STC president, says that one of the key challenges in her business, which sells services to technical communication managers and their executive leaders, is “getting people to take their management roles seriously as management professionals, rather than (seeing themselves) as second-class citizens in their companies.” She says we need to “become more politically astute in the organization. Learn to make a business case. Get out of the cubicle and start talking to people other than the developers.”

What can we do to raise our status? Holly Harkness replies, “We must become engaged with the business and offer solutions to business problems.” That requires an understanding of what drives a business in the first place—numbers and business concepts that often aren’t of specific interest to those of us who “just like to write.” In response to that, Stan Dicks, associate professor and director of the MS in technical communication at North Carolina State, says, “In our management course, we teach students that one of their biggest challenges is negotiating the political waters in organizations where they are often atypical of the other employees.”

We still need to repackage ourselves for the future.

There is room in every organization for someone with our unique combination of skills to make a contribution. “In fact,” says Vici Koster-Lenhardt, “some people who are excellent technical communicators do not even know the term [technical communicator].”

So how can you repackage yourself to find that niche that adds value and satisfies you professionally? “The technical communicator will see his/her role in the organization become more crucial over the coming years. We need to find out what we are passionate about and consider specializing,” says Bernard Aschwanden, president of Publishing Smarter in Toronto. “Technical communication needs people who are able to provide specific skills in areas like user documentation, tutorials, administrator guides, training videos, command line information, and more. No one person will be able to do all of these, and to do them well. Therefore, our best hope is to ensure that we grow ourselves to meet the unique roles that organizations will have for technical communicators, regardless of the formal title that is assigned to a particular job.”

Through the Looking Glass

I asked survey respondents “what is the next big thing on the horizon for technical communication?” They mentioned such things as “content convergence” from several genres and owners into a single information source; movement away from “books,” with more focus on content and less on format; use of social networking environments to deliver documentation; more community-authored information; and more focus on delivering information in “greener” ways.

I also asked where people thought we would be as a profession in five to ten years. Certainly, we have made some progress in the past five years, as shown

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in Figure 2, which highlights the trends influencing us five years ago versus today. What else might be happening?

“I think a big trend will be a demand for good technical communication skills in English in the Chinese and Indian markets,” says Vici Koster-Lenhardt. “In the next 15 years, there is expected to be a huge shift in the world GDP from the West to the East. So, one prediction is that more technical communicators will be working for companies that are producing documentation for the BRIC markets (Brazil, Russia, India, China), because these will be the countries that will be growing.”

We will also complete the paradigm shift to support what I call “information gratification.” The thrill of having Google answer every question in seconds has become an addiction—one that everyone will soon expect to have fed by all information sources in their lives, not just Internet searches. Chona Shumate says, “Online users are changing, and we will have to adapt to their style of how they access information.”

We also can expect a new wave of regulatory requirements in the financial, pharmaceutical, and manufacturing markets to generate opportunities for technical communicators. Saul Carliner believes “there will be a trend away from product-focused industries like hardware, software, and military equipment, and from meeting occasional deadlines associated with a product release, to ongoing deadlines associated with web-based publication.”

“Heck, in ten years,” says Shumate, “we’ll probably have holograms of talking text, with images of someone performing a procedure. Or, mental telepathy, where written information is no longer needed—just kidding—I think!”

Final Words

Based on the 2009 survey results, here is what I think we should be considering for the next five years:

• Information Gratification: Have we made our way away from books to wikis, social networking, user-authored content, multi-contributor information databases, and real-time updates? Have we kept pace with the way “real” people are delivering and receiving information in their everyday lives? Are we gratifying their need for personal, immediate content?
• Value, Value, Value: Is the information in your company being treated as an asset? Have you found a way to measure and state its value? Have you found a way to demonstrate your value as the guardian of that asset?
• Solutions: Are you an information solutions provider and a coach to other content providers? Are you a manager with ideas that promote the success of the business you work for?
• Advocacy: Is someone in management an advocate for the work you do and the contribution you make to the company’s bottom line? Are you known to the strategic decision makers two levels above you? Are you considered to be a beloved right arm that no one could think of living without?

If you can answer “yes” to these kinds of questions, then you have probably already begun to remix yourself for the future. If not, it may be time to start looking ahead, because before you know it, the next five years will have come and gone.

In the meantime, I think I’ll update my Facebook status: “Barbara is a technical communicator providing highly valuable information in new and different ways.” What are you doing?

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Bloom Wherever You’re Planted: A Different View on Fostering Career Longevity

By Whitney Potsus, Senior Member
In the technical communication field, there’s a lot of talk about the skills, tools, standards, and processes that should be learned in order to ensure career success. But somewhere between RoboHelp and Photoshop and DITA and PMI and CMMI, the more human aspects of being working professionals—the “touchy-feely stuff”—too often fall through the cracks of discussion.

Yet it’s this “touchy-feely stuff”—and not the tool skills—that ultimately determines one’s longevity in a job and in the field in general. How we manage our schedules, our emotions, and our energy affects our wherewithal to continue on as technical communicators for decades. Our sense of fulfillment, purpose, and passion within the field is in direct proportion to whether we feel we’ve been respected or walked all over, well-compensated or taken advantage of, well-utilized or completely overworked, included or ignored.

In the daily grind, it’s too easy to lose sight of where things started to go awry, too easy to become a burn-out employee with a victim’s mentality. It’s not until we’ve burned out that we learn to see when things are beginning to derail, when boundaries have been crossed too many times, when frustrations and resentments are starting to boil under the surface, and when focus and enthusiasm are threatening to leave the building. In our exhaustion and pain, we begin to realize where we could have averted a collapse, wish that there’d been a more painless way to learn the lesson, and wonder why they don’t teach this stuff in college.

Aside from recessions, layoffs, and company closures, much of our individual career path is well within our control. Knowing where the pitfalls are lets us control, too, how long and how happily we’ll be on that path.

**Dismiss the Myths**

There’s a myth out there that if you’re a technical writer you’re always going to work long hours. Whether you call it the Myth of the 12-Hour Day, the Myth of the 60-Hour Week, or the Myth of the 6-Day Work Week, it frames your work life before you ever dive in. If you start your day thinking “I’m going to be here for 12 hours,” you subconsciously set an intention that can contaminate your work habits, time management, and efficiency for the day.

Put another way, when you set the intention that you’re only going to be at work for nine hours (tops), you’re going to be less inclined to attend a meeting you really don’t need to be in, to allow your coworker to camp out in your cubicle for 20 minutes to kvetch about the dramas of the local youth soccer league, to let a delivery checklist meeting turn into a design discussion, or to allow yourself to wander off into the tech-comm blogosphere.

Yes, there will be days when you have to stay late, show a coworker some compassion, or read a couple of blog posts to help switch gears between tasks. But these days don’t have to happen every day.

**Set Boundaries**

Decide how many days a week you’ll work through lunch and how many you’ll go out to eat, go for a walk, or sit under a tree and read. Decide whether you’ll need overtime in on weekdays or on weekends (pick one—and only one), and how many nights a week (max) you’ll work late. Recognize that taking work home counts as overtime (see the previous sentence). Decide how many weeks in a row you’re willing to do overtime before you tell the boss a line has to be drawn (e.g., is it three 60-hour weeks in a row? five 50-hour weeks in a row? something else?). Decide how many nights you’ll work late to make up for someone else’s shortfall before you tell the boss changes need to be made (e.g., will you save someone else’s hind end once, twice, or three times before you say “ENOUGH!”).

There is no honor in enabling a bad situation, no long-term value in allowing dysfunction to run unchecked. If you’re routinely logging 60-hour weeks to keep up with your work and half your project team is working a straight 9-to-5 schedule (no matter how much work there is to be done), there’s a problem. Maybe the problem is with your work habits and time management, or maybe it’s a problem with how your project manager set up schedules and resource allocations, or maybe it’s a performance problem elsewhere on your team. Having ruled out or addressed problems within your own cubicle, management needs to hear the “Houston, we have a problem” call.

**Set a Humane Pace**

Learn what your “bad habits” are when you’re overloaded with work, and find ways to counter them. Stop skipping lunch. Don’t make the vending machine a component of your daily diet. Use your allocated vacation and personal days every year. If you’re self-employed and can’t yet manage the financial impact of taking off a full week for vacation, give yourself a three- or four-day weekend every other month (at a minimum). By spreading out time off, you give yourself R&R while minimizing the short-term impact on your checking account balance.

Read the guidelines on ergonomics and follow the advice on micro-breaks and extended breaks throughout the work day. Don’t do it and you will suffer the health consequences: your vision will change so much you will need glasses, your arms and hands will hurt so much you will be treated for repetitive stress injuries (RSIs) and carpal tunnel syndrome, and you’ll be so burned out that you’ll feel 30 years older than you are. Your body will always tell you when something is out of balance.

**Categorize Your To-Do List**

Organize your list into at least three categories—“must have,” “nice to have,” and “world wouldn’t end if I never did this.” Not having perspective on your to-do list means that the 150-item list of things you want to do to the company documentation, website, knowledge base, wiki, training system, etc., is going to needlessly overwhelm and stress you. So, too, will not distinguishing between “we have to do this” and “I want to do this,” or between “this new thing will make our company stand out from the competition” and “this new thing will make me stand out.”
It’s about balance and harmony. In a perfect world, everything we do would advance our employer’s interests and our own interests. In the real world, there’s juggling, balancing, shifting, negotiating, and postponing. Manage it well, and everyone just might get a piece of what they want each time, every time.

Break the “must have” and “nice to have” items into bite-sized chunks. You’re not always going to be able to launch something new in its entirety, but you can, over a defined period of time, make small steps that add visible, tangible, measurable value to your target audience.

Date your lists and list items. Make an appointment in your calendar to review them quarterly and annually. If something has been on your list for a year and hasn’t been touched (or even thought about), re-evaluate whether it really needs to be there.

Learn to Triage

When you’ve done everything you can and time is still too tight for the amount of remaining work, learn to logically triage a task list with the appropriate parties to identify what has to be done now and what can wait. What has to ship with a product, and what can be uploaded to the tech support site within the week after release? Who else on the team can be called in to help write decent first drafts of some documentation while you work on the things that really are best happening. Triaging also tells them that other steps they took earlier to mitigate problems in a project schedule weren’t quite enough. The good ones recognize this as another opportunity to become better managers.

Respect Yourself

Sticking to the decisions you made and boundaries you set is an act of self-respect and self-care. If you don’t honor the commitments you made to yourself then no one else will either. Don’t ever shortchange yourself on sleep because of a deadline for work; losing sleep because you got caught up in a good movie or a good book or a night of cuddling with your spouse is a different story.

Never cancel a get-together with friends or family for work reasons. They were there before you got the job, and they’ll be there long after you leave it. If you gain 20 pounds and have to go up one clothing size, please take it as a sign to work less, eat better, and move more; somewhere after 40 pounds, your self-esteem takes a beating and other people will see it before you do. (I say all this as someone who was overweight.) It’s a lot easier to lose 20 pounds than three, four, or five times that; course corrections are always easier when the bad habits aren’t deeply entrenched.

Know Your Worth

When negotiating for projects with clients (if you’re self-employed) or salaries with employers, don’t act like you need the money. Clients and employers can “smell” money fears on a contractor, and too many (but not all) will find a way to take advantage of your fear. Fatigue and fear seriously hamper the negotiation process and your networking abilities. They cloud your thinking and trash your listening skills. Your side of the conversation contains too many “I” references and not enough “you” references (“you” as in the client or employer). Fear makes you forget your

It’s this “touchy-feely stuff”—and not the tool skills—that ultimately determines one’s longevity in a job and in the field in general.
niche, your brand, your strengths, and your long-term professional objectives; you grab at anything, too often ignoring the gut instinct that tells you something isn’t right, and soon enough find yourself in the midst of a miserable situation. Fear also makes you discount your services more than you should, ultimately devaluing the high-value skill set that you’re trying to sell.

Fear can also alienate people completely. A contractor acquaintance here in Connecticut has a difficult time getting repeat business from clients because his fear is palpable; he becomes pushy, needy, clingy, over-attentive, and sometimes puts too much effort into locking in his next project with a client before he finishes the one he has. He’s in a vicious cycle that has him perpetually behind the proverbial eight ball; his behavior leads to long droughts, makes him desperate when he does have an opportunity to work, causes him to try too hard to lock in more work, and drives off a client who was otherwise willing to keep his skill set on hand.

Pay negotiations are difficult for many of us. The one thing I’ve observed, particularly with successful contractors/
consultants, is that when you are clear in your intentions, and clear about what you do and do not want to do and what you can and cannot bring to the table, negotiations come together effortlessly. You feel less like you’re selling and more like you’re connecting with kindred spirits.

Have a Well-rounded Life

Have something in your personal life that drives you out of the office at the end of the day, whether it’s training for a marathon, attending yoga classes, fostering rescue animals, doing crafts, playing sports, writing a screenplay, mentoring disadvantaged kids, or whatever it is that twirls your beanie. Otherwise, you’re at high risk of getting caught up in twelve-hour days.

And when you leave work, really leave work. At some point, you must shut off work. Your close friends and family only want to hear about your job for just so long. Your knitting group, photography club, and Tai Chi master don’t want to hear about it at all.

Pull Eggs from Multiple Baskets

Just as one interpersonal relationship can’t be expected to meet all of your emotional needs, one job can’t be expected to meet all of your creative and professional needs. When the projects you’d like to try just won’t happen where you’re working, and you’re not willing to leave your job either, then it’s time to look elsewhere during your off-hours.

Your options aren’t limited to freelancing and moonlighting. Volunteer work offers thousands of opportunities to marry professional goals and personal passions (just look on sites like www.volunteermatch.com and www.creativepaw.org). Within STC, there are scads of opportunities in the SIGs and chapters to blog, manage newsletters, design and manage websites, launch and present webinars, organize events, mentor, and more. Beyond professional organizations, there are thousands of small- to mid-sized nonprofits just praying that talented individuals will donate services to expand or redesign websites, produce marketing materials, develop educational materials, design logos and custom clip art, take photos, make videos, and more.

Whatever skills you’re trying to develop, there’s a nonprofit out there that’s willing to be your creative lab, whether it’s for an ongoing commitment or a single project. Folks have landed management jobs not because of skills developed in their paying jobs, but because of volunteer work. Others have launched design businesses as a result of designing logos for one nonprofit after another. Not only do you get résumé fodder, but you get enthusiastic references as well. You can tell a lot about a person by the diligence and commitment they give to the work they’re not being paid to do. And serving a cause greater than ourselves, trying to improve at least one corner of the world, provides a sense of fulfillment that can’t be matched by a paying job.

Manage Your Entire Schedule

Evaluate how you’re really spending the hours each day. A lot of professional/personal coaches will give their clients worksheets that show an entire week at a glance, with 24 hours shown for each day. Using different colored markers for the major areas of one’s life, the client is asked to spend several weeks recording what their days look like, including the mundane stuff (like grocery shopping and mowing the lawn) and the routine stuff (like sleeping and having a sit-down family dinner). They use the same tool to help you figure out how you can incorporate the pursuit of your real dream—for instance, teaching college courses or launching a photography studio—into your life without sacrificing other areas or burning out.

The colored boxes make it glaringly obvious which areas of your life are dominating your schedule. They show how much we take for granted in our schedules or how much we overlook. If Rover isn’t getting his nightly walk, what’s causing it—all the time you’re spending in LinkedIn discussion groups? If you haven’t read a book for pleasure in six months, what’s causing it—the time you’re spending in the blogosphere or reading work-related journals and books? Where does family time fit in around all the professional networking events? How do you find time to paint the den, clean out the garage, call your grandmother, or play golf with your buddies?

If/when you do have to cut something out of your life, you can at least be more deliberate in your choices and more confident that you’re keeping the things that feed you emotionally, physically, spiritually, or professionally—and discarding the things that don’t.

Have an Exit Plan

Know your exit criteria for any job. Everyone knows their own breaking point, their own tolerance level for dysfunction, chaos, disrespect, negativity, and pigeon-holing. We know the signs that tell us when we’ve hit some kind of ceiling in a company in terms of pay, promotions, or progress. We know the signs of a situation where things can be changed and where things don’t want to be changed.

Staying some place that brings you stress and illness instead of joy and fulfillment burns you out not just on that particular job, but also on our field in general and on life as a whole. Misery is contagious. Get out before your unhappiness and dissatisfaction become palpable for everyone around you.

These 12 points are, of course, a broad-stroke view of career management, and each one could easily sustain an article of its own. Being aware of them, though, can make you sensitive to the myriad details that naturally flow out from them. Details that, when managed well, can lead to a long and rewarding career.

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What was the question again?

When I began to write this article on career planning and longevity for technical communicators, I thought, “I’ve never met a technical communicator who had a solid career plan. Maybe they all secretly have a five-year, spiral-bound, color-coded manifesto? And besides which, I’m not sure I know exactly what a technical communicator is. I wonder if I’m one?”

For the purposes of this article, I’m going to define technical communicators as people who translate tricky or complicated information so that ordinary people can understand it and use it to make decisions. Every industry needs that kind of help. There’s a market everywhere you look for clear thinkers and communicators. If you’re in this game, that’s what you do best: communicate clearly.

As for making a career plan, let’s face it, most people I know in this line of work started off as something else: teacher, librarian, journalist, editor, project manager. They didn’t have a plan to get where they are and they sure don’t have one for the rest of their career. I’d argue that you don’t need a plan. I think the best way to ensure a long career in technical communication is to keep an eye out for new opportunities so you’re ready to move into any industry that might use your skills.

Now, if you’re thinking, “What opportunities?” and looking on Internet job boards to see what you missed, hold on a second. Although many people could probably use your skills, they just don’t know you’re out there; even if they suspect there is someone like you out there, they might not know what you’re called. If you want to find some new career opportunities, focus on your skills rather than on your job title. Many people don’t know what a technical communicator does, nor do they need to know. So where do you look for a place to ply your trade?

First of all, don’t rely on the newspaper classified section or online job boards. After all, until you know what you are looking for, it’s very likely you’ll just go out and get a job that’s nearly identical to the one you already have. Besides which, the most interesting employers haven’t even advertised because they don’t know you’re out there or what you can do for them ... yet.

I’m not going to discuss marketing, networking, or sending out flyers. I’m going to talk about finding people who interest you and getting to know more about them. Look for ways your skills could be used by those people and describe for them how their lives would be different if they had you on board. For example, “I see you have problem X. I solved a similar problem for Company Y. It involved these steps and it cost them about $Z. Would you like to talk more about it?” Who’s going to say no to that? It’s not rock science.

Like most people, I slipped into the technical communication field sideways. I began as a geologist with a background in geographical information systems. (A big, sarcastic thanks to the career counselor who convinced me that a science
degree would be more valuable than the arts degree I wanted to pursue!

After growing tired of spending my days in Western Australia shouting at large men with no front teeth, I left the mines and happily found work as a temp in Perth. I figured I'd go undercover (i.e., not tell anyone I was a geologist), but the temp agency found out I had a mining background and placed me exclusively with mining companies. I'm sure my science degree was a great comfort to them as I disconnected their phone calls, jammed their photocopiers, and bent the prongs on their binding machines.

My slide into technical writing began when I was taken on as a personal assistant to a project manager involved in implementing a software application called SAP in the late 1990s. I'll skip the boring bits of the story, but in this position, I learned all kinds of skills including writing software specifications, writing and delivering training material, working on a help desk, and writing instructions. Don't look now, Mum, but I'd accidentally become a technical communicator.

If I liked a particular team, I’d learn more about what they were doing, get to know the people, and offer to help them. This almost always resulted in a contract offer with their team. Over the years, I gained a terrific range of skills and opportunities, made money, and had lots of fun by finding people I liked! My career came full circle when I took a job with a large oil-rig working on a help desk, and writing instructions. Don’t look now, Mum, but I’d accidentally become a technical communicator.

My biggest step forward was meeting (and working for) Sue Dyson and Roger McShane of Quill Australia. They're technical communicators, but they’re also passionate cooks, published authors, regular contributors to international food and wine magazines, and radio announcers. They supplement their income by renting out a villa in Provence! Roger and Sue helped me to realize that you don’t have to be just one thing; your communication skills can be applied to almost any area that interests you.

It was after I worked for Roger and Sue that I met my business partner, the irrepresible Bruce Ransley, and we set up our own business, Impress: clear communication. Determined to buck the system and armed with a business plan whose beginning statement was “Work for people we like and help them to communicate better,” we decided we’d eschew traditional forms of marketing and promotion. We didn’t have a name for what we were doing initially, but we quickly realized that our simple “meet people we like” steps, when repeated consistently, hooked us some terrific clients who then, in turn, recommended other people to us. We were running a business and making money. We also had the luxury of free time to pursue our other interests. There was no traditional market for our skills, but by finding new and interesting people and telling them how we could help—using our communication skills—all sorts of great opportunities came our way.

The term *client fishing* was born when our local society of editors asked us to talk to their members about marketing and promotion. They thought we were doing something right to have built up a business from nothing, and they wanted to know our secrets. We thought, “Well, we don’t do any real marketing, we just talk to people we like. Anyone can do this. We need a name for it—we’ll call it client fishing.” The seminar went very well, so we wrote the ideas down in an e-book with the tongue-in-cheek subtitle: *The Freelancer’s No-shit Guide to Finding Great Clients*; after all, we think that the essence of communicating clearly is to cut out all thebull, which is what we tried to do in our 18-page guide.

And so I believe that the easiest and most enjoyable way to keep your technical communication career interesting and lucrative is to talk to people you like. Learn about what they do. Tell them about your skills, not your job title. Ask their advice about where they think your skills could be applied. Pursue hobbies or interests that you get a kick out of. Then go forth and be the best skydiving, quilting, mountain-bike riding, French-speaking, printmaking, cooking technical communicator you can be. If you’re passionate about something and you’re interested in other people, you’ll find fantastic new opportunities to use your skills in clear communication.

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**Suzanne Cooper** (suzanne.cooper@impress-cc.com.au) has a Bachelor of Science in geology. She dug her way out of a career in the gold industry in Western Australia to work with words and solve problems for people in all kinds of businesses. Suzanne undertakes a variety of activities with great enthusiasm and has been known to do stand-up comedy, knit, and train cats, among other things. Some of these ventures have been more successful than others. She lives and works with her partner, Bruce Ransley, in Tasmania, Australia. Together they run a business called Impress: clear communication (www.impress-cc.com.au).
Mining for Career Gold: Discovering Related Careers from Buried Skills

BY DIANA OST, Senior Member

As a technical communicator, my most valuable career assets are flexibility, the ability to re-purpose skills, and a willingness to apply those skills in various ways. In today’s economic climate, these attributes are important to maintain a career in the technical communication field. Career paths are rarely linear, and mine has certainly not followed a straight line. Layoffs, economic downturns, and industry changes have prompted me to repackage my skills to be more effective in a changing job market. Past experience in a variety of industries, plus additional duties I have taken on, have augmented my résumé and expanded my opportunities.

Where can the hard-earned skills you have acquired as a technical communicator take you? Standing the test of time as a technical communicator has added some detours to my career road map, such as stints as an editor, a requirements analyst, a business analyst, and a software tester. Each of these positions were founded in technical communication and required many of the same skills and experience.

How can a technical communicator adjust to changing market conditions and keep working when jobs are not as plentiful?

• Recycle experience and highlight skills that can enable you to apply those experiences to other fields.
• Use a fresh viewpoint to evaluate the skills you do have. Review different titles, translatable skills sets, and industries in which you may have already earned applicable experience. Remember to consider the jobs you had before you started your tech comm career, as well as volunteer positions and personal interests and hobbies.
• Think about additional duties you have had that that were outside of your job description, such as software testing, writing web copy, assisting a project manager, writing policies and procedures, helping with a sales proposal, or creating a graphic for a product sales sheet. Those experiences can be a foundation for a whole new career path.

One strategy that I have found to be very useful is to create a matrix of job titles, skills, and interests. Get your pen or keyboard ready, because using this technique requires some writing. You can use the lists you create to add to a...
your career

matrix. Creating a matrix may help you discover related fields, lateral moves, and career changes that make use of what you already have but have not considered as job assets.

**Titles**

Make a list of job titles. Some titles I have had are shown in the following list. Notice that a few of the titles in this list contain the words “analyst,” “developer,” and “tester,” which were natural offshoots from technical communication. Pay attention to those words in your list because they are clues to possible segue positions.

- Documentation specialist, technical writer, information developer, policies and procedures writer
- Scientific editor, technical editor
- Proposal writer
- Online help developer
- Software quality assurance tester
- Requirements writer and analyst

Don’t forget positions that are slightly out of the technical communication field but use many of the same skills, such as:

- Business analyst
- Technical writing instructor (college)
- Technical instructor (corporate trainer)
- Information developer
- Web designer

**Additional Duties**

Many positions have had extra duties in addition to creating technical documentation. These duties are often not recorded on résumés, but they are important experiences you can use to widen your repertoire. Some extra duties that I have accumulated outside of technical communication include:

- Project coordinator (managed software project documents)
- Project manager (managed documentation projects and project estimator)
- Process analyst (analyzed and documented business processes)
- Customer software engineer (provided customer support)
- Network administrator (managed Sun network)
- Designer (designed user interface for software)
- Usability specialist (provided usability information and data to software team)

**Additional Duties Matrix**

If you did work that was not in your main job description, you may wonder how applicable it is to a career move. You may be surprised at how much time was actually spent on these tasks. To calculate how much work experience you need for the extras, use the example matrix and calculations (see Figure 1).

**Skills**

Next, list skills you have acquired as a technical communicator, including the skills you listed in the additional duties matrix, any extra volunteer work, such as creating tutorials or presentations, and new skills that other experts have taught you. For example:

- Writing (general, technical, and marketing) and editing; grammar expertise
- Researching, analyzing, and organizing information
- Creating graphics, flow charts, and presentations
- Process analysis and ability to find gaps
- Audience analysis; understanding and relating to diverse groups
- Interviewing and public speaking
- Translating technical topics into information for non-technical audiences
- Creating teaching materials and tutorials (instructional design)
- Ability to learn and use software quickly and understand the target audience’s viewpoint
- Understanding best practices and standards, and the common software schemas that users encounter

**Industries**

Technical communicators often gravitate to certain industries and work in them for most of their careers while others may work in many different in-

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**Figure 1. Calculating Additional Duties Experience**

<table>
<thead>
<tr>
<th>While I was a...</th>
<th>For this period...</th>
<th>I spent X% of time doing this...</th>
<th>Which correlates to time*</th>
<th>And applies to this skill...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical writer</td>
<td>4 years</td>
<td>30% testing software and writing test plans</td>
<td>4 years X 30% = 1.2 years</td>
<td>Quality assurance testing</td>
</tr>
<tr>
<td></td>
<td>4 years</td>
<td>25% coordinating project tasks, maintaining the project schedule, and assisting the project manager</td>
<td>4 years X 25% = 1 year</td>
<td>Project coordination or assistant project management</td>
</tr>
<tr>
<td>Online Help Designer</td>
<td>5 years</td>
<td>40% designing information architectures</td>
<td>5 years X 40% = 2 years</td>
<td>Information architecture and design</td>
</tr>
</tbody>
</table>

*Time calculation is based on number of years multiplied by percentage of time spent on additional duty.

This counts as work experience—Put it on your résumé!
dustries, but perhaps with a specialty, such as software or hardware documentation. Industry experience is important because many industries require specialized knowledge, such as the medical or pharmaceutical industries.

The US Department of Labor’s list of industry categories provides a high number of jobs for technical communicators. The following are the common industry categories, ranked from highest to lowest numbers of jobs for 2007:

- Computer systems design and related services
- Architectural, engineering, and related services
- Management, scientific, and technical consulting services
- Newspaper, periodical, book, and directory publishers
- Software publishers

The Department of Labor Statistics also provided the following list of the top paying industries in 2007 for technical communicators:

- Financial investment activities
- Computer and peripheral equipment manufacturing
- Grant making and giving services
- Business schools and computer and management training
- Wireless telecommunications carriers (except satellite)

Industry experience can also be related to personal pastimes. For example, geology is a lifelong interest of mine, and I have been a “rock hound” from childhood. In college, it seemed natural to take geology for my science requirement. That interest, backed by college study, opened the door for a scientific editor position in the oil and gas industry. By factoring in strong interests and hobbies, such as solar power, space travel, popular culture, the outdoors, teaching, or even charities, those interests can be a passport into a related career.

Next, create a list of industries you have worked in, and don’t forget positions that may not have been in technical communication. For example, I spent several years working in a hospital as an event planner which later allowed me to do some grant writing, as well as other tasks like managing the daily hospital census and writing reports for all the major departments. That experience was very useful later when I was hired to document medical software for hospitals.

The following is a list of industries I’ve been involved in during my career. When you list the common industries of your career, group them by common themes, as shown below:

- Consulting
- Charitable foundations and community service
- Financial and mortgage
- Government (state and federal)
- Medical, hospital, and pharmaceutical
- Oil and gas research (scientific)
- Software
- Telecommunications

**Interests**

Finally, record interests, hobbies, or additional skills that may not be evident or used in your work life:

- Charitable and community volunteerism
- Environmental activities
- Earth sciences
- Popular culture on the web (such as Facebook, Twitter, blogging)
- Languages
- Arts and crafts, music
- Physics, astronomy, science
- Outdoors activities
- Teaching

**Creating a Jobs and Skills Matrix**

After recording your job titles, skills, interests, and industries, adding the list to a matrix can yield some great ideas for expanding possible positions.

Map your job titles, skills, and interests. Look for positions that make use of the listed skills and interests. If you need ideas, search job boards for the skill (not the title), check the US Department of Labor Statistics site (www.bls.gov), or check with your local and state labor or employment agencies on the web.

**Figure 2. Skills, Interests, and Related Positions Matrix for Technical Writers**

<table>
<thead>
<tr>
<th>These skills…</th>
<th>Plus these interests…</th>
<th>Could translate to this position…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical, medical, or scientific background</td>
<td>Popular culture</td>
<td>White paper (analysis reports) editor</td>
</tr>
<tr>
<td>Grammar and writing expertise</td>
<td>Fiction and nonfiction</td>
<td>Non-fiction book editor</td>
</tr>
<tr>
<td>Ability to relate to diverse groups of people</td>
<td>Reading</td>
<td>Science or medical editor</td>
</tr>
<tr>
<td></td>
<td>Business</td>
<td>Thesis or dissertation editor (freelance)</td>
</tr>
<tr>
<td></td>
<td>Education</td>
<td>Technical website editor</td>
</tr>
<tr>
<td></td>
<td>Computers and technology</td>
<td>Magazine editor</td>
</tr>
<tr>
<td></td>
<td>Inventions, engineering, research</td>
<td>Research and development editor</td>
</tr>
<tr>
<td></td>
<td>Sales</td>
<td>Web copy editor</td>
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<td>Textbook editor</td>
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<td>General editor</td>
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<td>Book editor</td>
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<td>English instructor</td>
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<td>Technical writing instructor</td>
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<td>Proposal editor</td>
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<tr>
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<td></td>
<td>Global culture and usability consultant</td>
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</tbody>
</table>
The example matrix contains some example skills, interests, and possible job matches. Note that these are not one-to-one matches. Several skills are needed for many positions, so there is some overlap. Some positions may require additional education to move into. The matrix is by no means an exhaustive list of possible jobs. There are many more that may be applicable for your experience and interests.

Technical communicators are, in general, people who have multiple interests, are well-read, and have a deep sense of curiosity about how things work. We are usually quick learners who enjoy both technology and people, and we can be a bridge between the two. Maintaining longevity in a technical communication career can take us down many paths that use and enhance our talents and capabilities, if we know how to look for the experience and talent we already have, and apply it to our next job. It is my hope that the tips here will help you to do just that, so you can get on with your next adventure in technical communication.

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Your career as a technical communicator is all that you’ve ever hoped for, and you are satisfied with your work. However, you may feel nervous and unsure if your organization recognizes your value—could your name end up on the next layoff list? What can you do? This article provides ideas to increase your visibility with upper management in your organization. I also suggest deliverables that you might add to your portfolio in order to become an integral part of your organization.

The technical communicator job title can include such roles as communicator, writer, illustrator, and programmer. When you think about what you do, try to expand your description to include titles from this list. Also keep in mind that some folks in your organization don’t care whether you are supposed to write only technical information. They hear “communicator” or “writer” when your name comes up, and they want you to develop whatever information they need. At one point, I wrote only user and systems documentation for software, and that was sufficient. Today, though, I reply “Yes!” to almost every request or directive I receive. I see my value in the organization increase each time I communicate something.
THE BOTTOM LINE TO PERFORMING THESE TASKS IS THAT I FOUND OPPORTUNITIES TO INCREASE MY KNOWLEDGE AND MY VALUE—AND MY PORTFOLIO.

Job Experience
I’ve held jobs at five companies since I became a technical communicator. Four of the five were primarily software documentation, yet I found things to do that didn’t involve software documentation at all, or that helped deliver information to customers in a better way.

During my career, I produced software documentation in the form of online help, user manuals, release notes, database documentation, systems documentation, technical bulletins, training guides, tutorials, white papers, data sheets, and trouble ticket resolutions. If you work with software, I would imagine that this list looks familiar. I’ve done other, non-software documentation, too: network diagrams, network server documentation, integration project documentation, and process documentation.

In addition to writing documentation, I learned enough to perform the following functions so that I could better help my users: HTML coder, help desk technician, usability testing observer and recorder, quality assurance tester, template creator and reviser, survey creator and administrator, committee chair, Access database creator, and style sheet creator. Some of this work helped users in a direct way (help desk technician), and some helped me deliver the information in a more efficient manner (style sheet creator). The bottom line to performing these tasks is that I found opportunities to increase my knowledge and my value—and my portfolio.

Now that I’ve moved into the oilfield services sector, I’ve acquired new deliverables and tasks including corporate intranet site maintenance, equipment operations guides and technical manuals, corporate announcements, and eForms.

I’ve provided these lists to illustrate the variety of projects that I believe any technical communicator can do. You can volunteer or you can accept the assignment when you receive it. Either way, you increase your visibility.

Volunteering for the Assignment
Before I became a technical writer, I was an administrative assistant in an IT department. One of my jobs was to create and maintain a network diagram for the Minneapolis campus. When I was promoted, I thought I had lost this task because it wasn’t software documentation, but I made a case to my manager and was able to keep the project. I argued that I had gained in-depth knowledge of the network and the software used to create the diagrams and that training a new administrative assistant might be time and resource restrictive. Furthermore, I argued that the network diagram is really a piece of technical documentation. Not only was I able to keep this documentation project, but I also had learned to argue the value of technical communicators within my department!

When the network was sufficiently documented, I started a project where I documented the servers on the Minneapolis network. This was another research-intensive project, requiring hours to document all of the software installed on the server and the various user groups that had access to the server.

The network diagrams and the server documentation were projects that were defined by a manager, but the server project would not have come along without the success of the network diagrams project. I increased my portfolio by demonstrating my technical knowledge and gaining the trust of the network team. When the next network-related project came up, the network team was enthusiastic about working with me.

Earlier, I mentioned several jobs that don’t involve writing, including HTML developer, style sheet creator, and template creator. These are jobs I took on because the need arose as I was writing documentation. Coding in HTML and creating style sheets and templates are part of the information development cycle, so I had to do them in order to
make the content development part easier. Furthermore, these jobs directly influence the look and feel of documentation and help an organization present a uniform face to the world.

Accepting the Assignment

In my current position, I am a technical documentation specialist working in the Learning & Development group at my company, which lives in the Human Resources department. When I started, my first assignment was writing a training manual. Not long after starting that project, I was asked to help update the employee handbook for one of the HR directors, and another director asked if I might be able to help write some documentation about our acquisition process. I accepted both assignments so that I could bring some visibility to my group and position.

Today, my project list has grown to include three engineering projects, safety plans for three lines of business, Learning Management System (LMS) documentation and administration, HR intranet page updates (including maintaining organizational charts), internal announcements, and several eForms.

My position is a new one at the company, but my director did his research before bringing me aboard, and he continues to advertise the abilities of this position. During the hiring process, he approached the engineering group and asked them if they could use a position like mine. They agreed that the company could use technical communicators. They included the position in their 2009 budget, but did not receive funding. That leaves me—documenting oilfield equipment is a new challenge that lets me increase my value to the company.

It’s Not Technical Documentation

A project to update the employee handbook may not seem technical, but the tool you use (FrameMaker) and the way you present it to your audience are tasks that technical communicators are very familiar with and can accomplish quickly. For our employee handbook, I use FrameMaker to save each policy as a separate file, organize and reorganize the files based on review comments, and provide a complete index (in addition to the table of contents). Now we can easily update and distribute a policy and send out single policies upon request.

Jobs such as help desk technician, usability testing observer and recorder, survey creator and administrator, committee chair, and Access database creator are also not technical per se, but they are good jobs for which to volunteer.

Proactive Project Planning

I recently listened to John Hedtke’s webinar, “Proactive Project Planning,” in which he suggests creating a project list that includes known projects versus those that are just rumor and innuendo (for example, a project that someone mentions in passing). This method is certainly good project planning, but it also helps you expand your list of deliverables and demonstrate value.

As a technical communicator trying to expand your portfolio and provide more value to your organization, creating your own project list based on what you’ve heard shows that you’ve been paying attention, that you have contacts everywhere, and that you want to help all projects succeed.

Here are my suggestions for proactive project planning to increase your value:

- If you hear a rumor, talk with your boss or the project manager and ask to be included. Use the rumor to educate the project manager about how you can produce documentation for the product on time by being involved in the project from the beginning. Even if the project is still in preliminary stages, the project manager will have no excuse for bringing you into the project late.
- If you’re in a meeting and hear about a project that you think could use your expertise, go to your boss. Show your management how documentation—technical or otherwise—can help the project succeed.
- If your boss suggests that you should work on Project X, start talking to the project team and plan what you can deliver. You might be coming in to the project late, but diving in lets the team know that you are there to work with them and provide value to the project.

Just-in-time Projects

When you can’t be proactive, be just-in-time. There will always be projects you don’t know about at the beginning. When that happens, smile and give the team what you can. If you don’t have time to give them online help because development is done, give them a quick reference guide. The online help can come with the next version, and you’ll be involved in that version from the beginning. The point is to be flexible. Whatever you do, don’t say no. The project is there for you to complete, even if it isn’t exactly what the team originally requested.

Many thanks to the following individuals, without whom I could not have written this article: Dennis Hutchison, for giving me time; Anne Gentle, for giving me the idea; and John Hedtke, for giving me the proactive project planning idea.

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As an academic who teaches technical editing to undergraduates, I wanted to know what employers’ expectations for their new hires were. In September 2007, I asked the Technical Editing SIG discussion list: “What would you expect from a new hire who has completed a technical editing course (beyond being well-versed in grammar, mechanics, and punctuation)?” I received 18 responses to my question, and the range of issues raised by the listserve participants surprised me. While some of the responses stressed knowledge of the basics (strong knowledge of grammar, punctuation, and style guides), other responses were less focused on editing mechanics, concentrating instead on adept interpersonal skills and familiarity with various technologies. The technical editor’s responsibilities extend beyond grammar checking; the editor must be able to ensure consistency, logical structure, completeness, usability, and effective communication among all parties.

Grammar and Mechanics

While any company should be able to safely assume that a new technical editor would have a solid command of grammar, punctuation, usage, and mechanics, this is not always the case. Several respondents emphasized that this basic knowledge, which I assumed applicants would possess, was lacking. One respondent, Candy Jenkins, said, “I don’t believe enough emphasis is stressed on grammar and mechanics in institutions of higher learning, so having a good foundation in that is important.” Many companies use editing tests to ensure that their applicants have this most basic editing knowledge.
Style Guide

New editors must be familiar with standard proofreading marks and experienced with using more than one style guide, especially the more widely used guides such as APA, Chicago, and IEEE. Because editors are divided regarding the use of soft-copy and hard-copy edits (see “Paper, Screen, or Scissors: Editing on Hard Copy or Soft Copy,” Corrigo, July 2007), they continue to use proof-reading symbols, and authors rely on a standardization of these symbols to understand the edits. Editors must also be able to create and maintain an in-house style guide (or a document-specific style sheet) to promote consistency within a company. Furthermore, new editors must acquaint themselves with whatever style guide the company already uses. Virginia Janzig remarked, “The editor needs to find out what style guide is used and then use it even if she doesn’t agree with some of the guidelines.” This knowledge allows the editor to edit with confidence by referencing a standard to support edits and make only necessary changes.

Interpersonal Skills

Editors must be able to adeptly defend their edits across many levels of an organization’s hierarchy. These edits must be based on sound reasoning (or a notation in a style guide) and readability (as defined by the user or audience). To do this successfully, a new editor must make intelligent edits, write helpful and respectful queries, and persuasively communicate the changes to the author(s). These skills allow the editor to assist the author and to advocate for the user without projecting an “I-just-got-my-degree-and-know-it-all” attitude. When a new editor explains her edits to an author, she must do so with tact. And, according to Jennifer Coury, editors “should always be able to gracefully explain [their] edits (either by email or in person).” Not only should effective editors be able to write clear queries within the document, they should also be able to discuss the emendations with the author through email, in person, or on the phone.

The editor is ultimately responsible for ensuring the author’s message seamlessly reaches its audience.

Teamwork

While many technical writers and editors wish they could work alone, it just isn’t so. “Gone are the days when the editor sits alone in a corner, rarely to be approached except in times of grammar crises,” wrote Catherine Rudiger. New editors, especially, must integrate themselves into whatever project, big or small, they need to accomplish. This element requires, as Stephanie Weiss explains, “teamwork, flexibility, follow-through, and project management skills.” All too often, junior employees defer to their more senior colleagues. A successful technical editor, regardless of rank, must communicate clearly to writers of all skill levels and not be intimidated by a person’s degree or seniority. Good communication allows consistent editing of documents across organizational lines and document versions.

Documentation consistency requires an editor to look beyond sentence-level edits to examine the whole picture—page design, template use, layout, and font. With this editing task, a new hire must refer to a style guide or documentation guidelines to maintain the organization’s “look and feel” for documents, whether delivered in e versions or in hard copy.

Technology

New hires must be familiar with various technologies: the web, content management systems (CMSs), advanced features of word processing, XML/DITA, and FrameMaker, to name only a few. As Jim Purcell wrote, “Nothing irritates writers more than editors who know language but have no idea about technology.” A familiarity with technology allows a new hire to acclimate quickly to a new position without extensive (and expensive) training. With the job market growing ever tighter, new employees in technical writing and editing must demonstrate complex skill sets. This includes, as Christina Bottomley emphasized, “the ability to upload docs to a website, learn a CMS, follow a style guide, and update changes in multiple docs.” An interest in technology helps new hires investigate editing options and delivery methods. It also keeps them on the cutting edge of software packages.

Translation

In the global economy, technical writers and editors must prepare for their documents to be translated into other languages. With this in mind, an editor must be able to “meet the challenges of creating documents that will be translated” and understand “strategies for keeping translation costs low,” according to Julie Kumasaka. This editing skill involves an eye for consistency in usage and terminology, avoidance of jargon and idioms, and clarity of expression. In addition, a new editor may have to justify these types of edits to an author persuasively and confidently. Furthermore, knowledge of another language aids in the task of translation and deepens an editor’s understanding of English usage.

Conclusion

While researching undergraduate technical editing courses across the country, I have found that many address the issues expressed in this article, which has opened my eyes to the complex nature of technical editing and created an avenue for more effective instruction. The editor is ultimately responsible for ensuring the author’s message seamlessly reaches its audience. At times, educators become removed from the work world and need to update their skill set and corporate knowledge. As evidenced by the detailed comments I received, educators cannot take anything for granted when it comes to preparing undergraduates for “the real world.”

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Editing Modular Documentation

Some Best Practices

By Yoel Strimling, Member, and Michelle Corbin, Associate Fellow
S

one of the biggest names in
the field of technical commu-
nication (Ament, Hackos, and
Rockey, to name only a few)
have written extensively about the cre-
ation of modular documentation and its increased usability. But very little
has been written about how to edit that
modular content, and what the editor’s
role should be.

Because writing modular documen-
tation is different from writing linear
documentation—writers are now develop-
ing content rather than just writing that content—editing this modularized
content requires a different mindset from traditional editing.

Using the three key concepts behind modular documentation (see sidebar), as well as our combined editorial experiences, we have come up with eight guidelines that we consider to be best practices for editing modular documentation, and three concrete suggestions about how editors can be involved in the process of creating modular documenta-
tion. We believe that these guidelines and suggestions can help both writ-
ers and editors work together to create clear, consistent, and usable modular
documentation.

Editors must ensure the following:

• All topics are standalone.
• Introductory information is clear and
to-the-point.
• Topic types are not mixed.
• Topics are not too long.
• Paragraphs are short.
• Titles are unique and descriptive.
• Related topic links are meaningful.
• Topic collections are useful and reader-
focused.

Make Sure All Topics Are Standalone

Because modular documentation is made up of chunked topics that are not
read in any particular sequence, each one must be standalone—readers must
be able to understand the topic they are reading without having to read some-
thing else. However, topics should not repeat the same background informa-
tion over and over again.

Editors must determine how self-contai-
ted a standalone topic must be and
how much repetition of information is
needed. When we edit these topics, we
must keep in mind the question, “If
readers started reading at this topic and
had not read anything else prior to this,
would this make sense?” If the answer
is “no,” then we need to make concrete
suggestions about how to make it “yes.”

Make Sure Introductory Information
Is Clear and To-the-point

Chunking documentation into mean-
ingful, standalone topics requires that
the information in the topics is orga-
nized in a logical and usable order.

Editors must ensure that the first
paragraph of a topic states the purpose
of, and summarizes the information pre-
sent in, that topic. This introductory
information (also called a “short de-
scription” in the DITA parlance) helps
readers know if they are in the right
place for the right information they
need. The first sentence of the topic
must also be clearly and directly related
to the title, so readers can immediately
see the connection between it and the
topic content.

Make Sure Topic Types Are Not Mixed

Modular documentation is chunked
so descriptive information (concept
and reference topics) is clearly separ-
ated from task-oriented information
(task topics). Editors must be aware that
readers who are looking for information about
how to do something do not want
to wade through too much descriptive
information to get to what is relevant
to them. Similarly, readers who want to
know detailed background information
about what a product or service does do
not want to see step-by-step procedures
about how to use it.

An important point must be made
here, though. All task topics need some
sort of brief introduction (one to three
sentences) about the purpose of the
task and its context. This descriptive
information is an integral part of the task
topic and is not a separate, standalone
concept topic.

Make Sure Topics Are Not Too Long

Chunking documentation limits the
length of topics, improving the read-
ability and usability of the information.
But how much information can really
go into one topic? If you make the top-

ics standalone, how much information
can you include before it becomes too
much?

Unfortunately, editors are forced to
use the classic response to many quand-
daries: It depends. It depends on the
subject, the audience, the environment,
and many other factors. One of the best
ways to help editors organize topics so
that length is not an issue is the newspa-
per concept of above the fold (or, for web-
based content, above the scroll). Readers
almost always read the information
above the fold (or what starts the topic)
but only sometimes make it to what is
below (or what comes at the end of the
topic). This rule of thumb can help ed-
itors decide where to draw the line.

Make Sure Paragraphs Are Short

In addition to limiting the length of
the topics by chunking documentation,
paragraphs must also be kept short.
Readers do not read every word of our
documentation. They skim and scan it
seeking the tidbits of information that
will help them get their job done.

Here, too, editors can use a newspa-
per analogy to determine how long is
too long. Newspaper articles are never
just long, unbroken columns of text,
but instead are made up of several short
paragraphs that flow from one to anoth-
er. The same is true for modular docu-
mentation: the number of sentences in
a paragraph must be kept to a usable
minimum.

Make Titles Are Unique and
Descriptive

Topic titles use specific syntax to com-
municate the type of information in the
topic (for example, gerunds or verb
forms communicate task information,
such as Managing Clusters, and noun
or adjective-noun strings communicate
concept or reference information, such
as Cluster Management). Topic titles also
help readers decide if they need or want
to read the topic. This decision is anal-
ogous to reading a newspaper. When
people look at a newspaper, they look at
the headlines first. If the headline is in-
teresting or relevant, they read the rest
of the article.

Because the same holds true for mod-
ular documentation, editors must en-
Make Sure Related Topic Links Are Meaningful

Linking topics together is an important component of modular documentation, helping readers navigate between topics and retrieve relevant information. Several different types of related topic links can be implemented for modular documentation: inline links, related information links, and parent/child links.

Editors must define a consistent and logical linking model, which defines if and how each of the types of links that are available will be used. For example, if an inline link is used, then that link cannot also appear as a related information link. It is also important to define the acceptable number of clicks for your readers and your information, and then design a linking model that supports that number.

Make Sure Topic Collections Are Useful and Reader-focused

The final best practice guideline encompasses all three of the basic modularization concepts. Although modular documentation is made up of chunked, standalone topics that do not have to be read sequentially, a clearly labeled information hierarchy or story that links the topics in a document to each other must exist. Task topics almost always have related concept topics, reference topics are referred to by multiple concept topics, and so on. Even when a document is written in a modular style, it must still be organized in a logical and usable manner.

Editors must ensure that the topics being reviewed follow this hierarchy and tell the appropriate story. For example, tasks can appear at the topmost levels of the hierarchy, and the concept topics and reference topics that support those tasks then appear directly under those task topics. Grouping, ordering, and labeling topics logically (in some order of sequence) and consistently within a product information set, as well as across information sets, is important to readers.

There are also times when readers need to be forced to read sequentially, for example, tasks that must be done in a particular order. In these cases, editors need to provide appropriate tools for writers, such as creating standardized wording in the introductory information for task topics stating the number of the task and the task sequence, or creating a rule for linking the first and last steps in each task in the sequence.

The Editor’s Role in Creating Modular Documentation

As editors, we play a critical role in creating readable and usable modular documentation. We must become experts in the principles behind modular documentation, we must educate writers about the best practices for delivering it, and we must remain advocates for our readers, reviewing content from their perspective. Here are three concrete suggestions about how to meet these goals.

Best Practices for Editing Modular Documentation

Most of the literature on modularization is based on Kurt Ament’s three key concepts:

- **Chunk text into logical standalone topics**: Chunking blocks of information into topics based on their content type (the most common topic types being concept, task, and reference) separates descriptive information from task-oriented information, and helps readers get to the information they need without having to hunt through irrelevant material.

- **Label topics with clear and meaningful titles**: Labeling topics with unique, clear, concise, and descriptive headings provides immediate visual clues to help readers easily search for and find what they are looking for.

- **Link related topics to each other**: Linking topics to other related or relevant topics helps readers easily jump back and forth between related subject matter in a document.

The Editor as an Expert

Over the years, technology has evolved to more fully support modular documentation. The semantic tagging of XML solutions like DITA and the delivery of web-based documentation let us deliver highly structured, highly searchable, and highly usable topic collections.

To realize the potential of these topic-based technologies, editors must become experts in XML and the principles of modular documentation to help deliver the content to our readers in the most usable way.

Usability guru Ginny Redish has suggested that editors should create detailed style guides that define the best practices for style, content, and the required tagging. In addition to this excellent advice, we add the following two suggestions for how editors can contribute to a modular documentation team:

- Create templates and sample topics
for writers to use, in order to ensure consistency and to help deliver on the vision from the start.

- Provide editing comments that use the language of the technology. For example, instead of indicating that a command name must appear in bold, we would comment that the `<cmd>` tag must be used.

**The Editor as an Educator**

Most good editors are seen as educators or coaches for the writers on their team, helping them improve their writing skills. We must truly embrace the role of educator in modular documentation projects, providing continuous education—before, during, and after the project—about the principles involved, the topics and the templates used, and the overall delivery of the content to the end users.

Although education often takes the form of classes or mini-lessons, one of the most valuable education sessions is the one-on-one consultation with writers while they are writing their topics, rather than waiting until the final edit. Private, personal communication, where no question is too small (or considered wrong or stupid) can help the team produce high-quality content.

The role of educator is critically important when a team is transitioning from linear-based writing to topic-based modular writing. Although writers can easily learn the technology and come to understand the concepts and rationale behind topic-based modular writing, they often struggle with the actual writing of the topics. Because topic-based modular writing is a more collaborative, more focused type of writing that requires a completely different mindset from linear-based writing, editors need to provide writers with classes, lessons, and one-on-one consultations from beginning to end.

**The Editor as a Readers’ Advocate**

Editors are often the first readers of information. We are the readers’ advocate, bringing their needs to the table. We are accustomed to ensuring that our information has one voice, completely covers the tasks, and is readable and usable. But this core task in our editing process is even more critical for modular documentation.

Regardless of how the information is developed, we must always review the information in context, as the reader will see it and use it. That is, if the reader will see it and use it on the web, we must review it in that context; if the reader will see the information in a PDF file, then we must review it in that context. With modular documentation, it is too easy to work only at the lowest possible level, reviewing individual topics during different times in the development cycle. An editor is usually the only team member who reads the entire set (or nearly the entire set) of information from the reader’s perspective and in the reader’s context.

Modular documentation enables reuse. It is quick and easy to reuse topics from one deliverable to another (for example, on an online help system or in a PDF book), but also to reuse the topic by connecting it to another through a related topic link. As the readers’ advocate, we must take a step back from the benefit that writers receive (the reusability of information) and remain focused on the benefits that our readers need to receive from modular documentation: usability.

**Conclusion**

Editing modular documentation is both similar to and different from editing linear, sequential documentation. We still look for English grammar, style, and usage, of course; however, we also must be sensitive to the special principles behind modular documentation. Making sure that information is chunked properly, labeled correctly, and linked appropriately are critical skills that editors must learn.

Ultimately, editors must become experts and educators, working collaboratively with writers to deliver high-quality, highly usable modular documentation. Our role as reader advocate is even more critical to the success of a modular documentation project.

These guidelines, along with realigning the editor’s role in creating modular documentation, can help writers and editors create their documentation in a more efficient manner, or think about processes they can put into place to make their documentation more modular, or build training programs to help writers think differently and write modular documentation, or … the list is truly endless.

**Suggested Reading**


This article is based on a presentation and proceedings paper from the 2008 STC Summit in Philadelphia.

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HEY ROCKY—

WATCH ME PULL A CMS OUT OF MY HAT

BY NEIL PERLIN, Associate Fellow
Content management systems (CMSs) have been a hot topic in technical communication for some years now. But for all their power, CMSs have drawbacks that make adopting them a risky proposition. Three specific drawbacks that form the base of this article are cost, complexity, and cultural fit.

- CMSs are more expensive than standard technical communication tools. It’s not unusual for a CMS to cost over $100,000 versus about $1,000 for a standard help authoring tool like RoboHelp.
- CMSs are more complex than regular tools, which makes development standards vital. We can use help authoring tools (HATs) with few or no standards and they still work, albeit poorly. But without standards, buying a CMS is sort of pointless because much of its power is wasted.
- The need for standards brings with it a need for developmental rigor and training. It’s hard to create a metadata standard, for example, if we don’t understand what metadata is and why it’s important, and it’s hard to consistently maintain that standard without an environment that requires rigorous adherence to standards.

So we can ask two questions about adopting a CMS:

1. Do we really need one?
2. If so, are we ready to use it effectively?

If we don’t answer these questions, we risk repeating a mistake of the 1990s when companies bought HATs without first determining if they needed one and how it fit their workflows and culture. The problem is that it’s hard to know if a particular tool is appropriate until after buying it. With that problem in mind, this article’s goal is to survey major elements of a CMS and the equivalent elements in HATs to see whether we might be able to:

1. Use a HAT to simulate a CMS in order to see how our workflow and culture may have to change in order to use the CMS effectively.
2. Use a HAT as our real CMS.

In some cases, I’ll illustrate a point by referring to two major HATs, Flare and RoboHelp, because I’m certified in and most familiar with these two. However, my overall points are not specific to any one HAT.

### Elements of a CMS and HAT Equivalents

One problem in discussing CMSs is the need to define what elements/features they offer. The abridged list below comes in part from InfoWorld Test Center Guide: Content Management Systems by Mike Heck, 29 February 2008. So what are the elements of a CMS and the HAT equivalents?

- **The ability to store content chunks in a repository.** If you want to use a HAT to simulate a CMS, you can use Windows’ file structure as a pseudo-repository. HATs don’t have repositories per se, but they are heading in that direction. For example, MadCap is supposed to release its Team Server product sometime in late 2009.

- **The ability to (easily) create authoring templates, using either the CMS itself or an authoring tool with which the CMS can communicate.** HATs have offered this capability for years. It’s easy to define and create topics to be used as templates and integrate those templates into your HAT’s interface.

- **Support for single sourcing/multichannel publishing.** HATs have supported this since Doc-To-Help appeared in 1991.

- **The ability to create content using the templates within the HAT’s GUI, without having to work at the code level.** In other words, we want to be able to author in an environment that looks like the familiar Word or Framemaker. Again, HATs have supported this since Doc-To-Help in 1991.

- **Give power users access to the code.** Every HAT I know of gives access to the code. It’s usually best not to use this feature because working in code can lead to quirky results and is a fertile source of errors, but working in the code does offer capabilities that the GUI may hide.

- **Plug-ins for desktop applications like Word or Framemaker?** Every modern HAT I know of offers Word and Framemaker import and export. Interestingly, RoboHelp also supports PDF import.

- **Digital asset management capability for images, SWF, and other multimedia files.** HATs have let us insert images, SWF, audio, and other multimedia for years.

- **Version control capabilities like rollback and differencing.** HATs have supported these features for years through their own VCSs or third-party VCSs. These features can be complex and quirky and have varying levels of support, but they are available.

- **API support if you have to tailor the CMS to work with your enterprise systems.** I’m not aware of such support in the HATs. In fact, the idea of being able to tailor a HAT to work with specific enterprise systems goes against the plug-and-play nature of a HAT. If this is something you need, talk to your HAT vendor.

- **The ability to import data in a variety of formats.** HATs can import in Word, Framemaker, HTML, HTM, XHTM, XHTML, and PDF files. If you need to import material that isn’t in one of these formats, the tool used to create that material may allow conversion to HTML or XML.

- **The ability to output to a variety of formats.** HAT output formats include WinHelp, HTML Help, WebHelp, server-enhanced WebHelp (like Flare’s WebHelp Plus and RoboHelp’s WebHelp Pro), DotNet Help (from Flare), Word, Framemaker, AIR (Adobe Integrated Runtime), PDF, XHTML book, XPS, FlashHelp, FlashHelp Pro, and probably others if you can write the transforms.

- **The ability to customize the interface via an open SDK.** Many HATs let us customize the interface and save the result as a “layout” (Flare) or “environment” (RoboHelp). You might do this if you want to set up the HAT interface in the most efficient way for indexing, for example, and then be able to call up that interface the next time you’re indexing, without having to recreate it.

- **The availability of add-ons for things like social media or documentation and records management.** Many HATs offer add-ons. For example, Flare has Analyzer for project analysis, Blaze for hard copy, Mimic and Echo for multimedia, Feedback Explorer for usage tracking, and others. RoboHelp offers RoboHelp Server, RoboSource

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**InfoWorld Test Center Guide: Content Management Systems by Mike Heck, 29 February 2008.**
for version control, Captivate for SWF movies, and more.

- The ability to personalize the content, and to tailor it to specific users or groups. HATs have offered this capability for years through conditionality, variables and snippets, variables in snippets, style sheets, style sheet mediums, master pages, and more.

So the feature sets of today’s HATs closely track many of the elements that Heck defines for a CMS. In addition to the feature sets, Heck notes that a basic CMS costs from $7,000 to $85,000 (presumably per seat). Other costs, like setup, template creation, scripting, workflow design, and training can add $25,000 to $50,000. This level of cost is a new world for many technical communication groups.

To make things more difficult, a CMS vendor will rarely quote a price by phone since it depends on variables like number of seats and setup requirements. For a HAT, however, you can just go to the vendor’s site to find the cost, which will be per seat, so you can easily figure out what you’ll pay.

Heck also refers to satisfaction concerns with a Jupiter Research survey that found 27 percent of CMS users to be “very unhappy with the difficulty of using their (CMS) and considering a more straight-forward replacement.” I don’t know of a similar survey for technical communication other than, to a degree, the WinWriters tool survey, so I can’t give specific figures for HAT user satisfaction. But it’s a lot easier to be dissatisfied and switch tools if you’re writing off $1,000 rather than $100,000.

In summary, CMS features may be new to technical communicators or more complex than technical communicators have had to deal with. They’re technically demanding. They may alter your workflows. They may not fit your culture. They’re expensive. And even if you do everything right, there’s a one-in-four chance of dissatisfaction and little opportunity to change your mind or get a refund.

To reduce or avoid these problems, you can use your HAT to create a simulated CMS for test purposes or perhaps as the real thing. If you have Flare 4, or RoboHelp 7 or 8, you won’t have to spend a dime. If you have RoboHelp X5 or 6, you will have to upgrade to 8 for about $1,000, but that’s still inexpensive compared to buying a real CMS.

How Might You Use Your HAT as a CMS

Step 1 — Define

Simulate the real definition work you did (or should have done), with your HAT. This includes defining your information types and creating the equivalent topic templates in the HAT, plus defining any other control files that you need—style sheets, master pages, skins, conditions, etc.

Step 2 — Create

To simulate real development:

- Create topics based on the topic templates.
- Create variables and snippets.
- Add variables to snippets and conditionalize some snippets.
- Create topics that only contain calls to snippets.
- Generate your usual targets and test the result.

- Try plugging in files created externally, like SWF movies. If the HAT interfaces with plug-ins from the same vendor, like Flare’s ability to share variables with Mimic, try that.

Step 3 — Manage

And to continue simulating real development, test the project control and management:

- Send topics out for mock review.
- Explain the project structure to a new hire. Can that person follow what you did?
- Check the project documentation. Does it adequately explain the structure and design?
- Ignore the project for a week, then return to it to see how hard it is for you to pick up again.

The Gist of the Test

The gist of this test is simple. After working on the project for a few weeks:

- Can you keep track of the project?
- Can others who weren’t involved in its initial design?
- Is it doing what you need?
- Is it revealing workflow problems?
- Technical knowledge? Developmental rigor?
- How are people reacting culturally?

These are all good things to know before spending $100,000 or more. And the cheapest way to find out is to use the tools that you may already have.

Neil Perlin (nperlin@concentric.net) has 30 years’ experience in technical communication, with 24 in training, consulting, and development for various types of online formats and tools such as WinHelp, HTML Help, CE Help, JavaHelp, RoboHelp, and some now forgotten. Neil is a columnist and frequent speaker for STC and other organizations, a senior member of STC’s Boston Chapter, and an Associate Fellow.

Neil is a Madcap Certified Instructor for Flare and Mimic, and a Macromedia-Certified Instructor for RoboHelp and Captivate. He provides training, consulting, and development for online help and documentation, Flare, RoboHelp, Mimic, Captivate, XML, single-sourcing, and structured authoring through Hyper/Word Services (www.hyperword.com) of Tewksbury, MA.
When visiting the STC homepage, you immediately see the value of being a member: there are links to STC publications, including Intercom, News & Notes, and Technical Communication; various live web seminars; Corporate Value Partnerships that provide discounts on software; and much more. But one of the resources available to members that often gets overlooked is STC’s partnership with Aberdeen Group, a leading fact-based, market research firm, which brings you exclusive, FREE access to the latest Aberdeen analysis, market-moving news, and vertical insights. With more than 5,500 research documents, Aberdeen’s research library enables you to discover the priorities of Best-in-Class enterprises. Here you will find links to Aberdeen’s entire active research repository, including:

- Hundreds of Benchmark and Best Practices Reports
- Business Value Research Analysis
- Research Briefs
- Market Perspectives
- Key Performance Indicators

Among the thousands of research papers available, here are a few that are particularly relevant to technical communicators:

**Documentation Goes Global**

With more companies selling products in global markets, the need for improvements in localization of product documentation has come to the forefront. Companies have to launch products, as well as translate and localize associated documentation. One of the biggest challenges technical communicators face is creating high quality localized documentation while avoiding escalating localization costs. The ability to achieve both quickly can make or break a successful product launch. This research benchmark provides an in-depth look at the processes and procedures of translation and localization, best practices, and specific recommendations on how to formalize and standardize localization, utilize structured authoring to increase reuse of content, and properly and consistently manage the outsourcing process. View this research document at [www.aberdeen.com/summary/report/benchmark/4658-RA-documentation-goes-global.asp](http://www.aberdeen.com/summary/report/benchmark/4658-RA-documentation-goes-global.asp).

**The Problem with Experts: Mistakes Companies Make by Overlooking Technical Communicators**

Faced with harsh pressures to get products to market under tighter schedules and budgets, organizations struggle to find a way to push out related documents as quickly as possible. One way that some companies do this is by circumventing the technical communication department altogether by assigning the creation of product documentation content to subject matter experts. Aberdeen shows the adoption of this practice is expected to grow by 80 percent in the coming year. According to this research document, in which 360 technical communication departments were interviewed, many organizations believe that assigning subject matter experts to create technical communication content may seem like an effective way to “trim the fat” from technical publications. However, it often has the opposite effect. This research paper shows the damage organizations do by overlooking the importance of technical communicators. View this research document at [www.aberdeen.com/summary/report/perspective/5759-AI-expert-technical-communicator.asp](http://www.aberdeen.com/summary/report/perspective/5759-AI-expert-technical-communicator.asp).


What’s on the horizon for technical communications? For some, it still means the adoption of topic-based authoring. Aberdeen’s research suggests that for others, it means the mainstreaming of dynamic publishing. A topic-based authoring approach promotes greater content reuse and is seeing a considerable impact on the authoring efficiency of technical communications projects today. This report provides a snapshot of current technology communications and identifies what directions organizations have planned for the future. Often conflicting pressures to produce communications that better fit customer demands as well as stay within tightening constraints on budgets and schedules are leading many technical communications organizations to a topic-based approach to authoring. In fact, 58 percent of participants in Aberdeen Group’s October 2008 DITA and the Technical Communicator’s Transformation study report that they currently follow author content in a topic-based manner, with a vast majority of those remaining planning to implement one in the future. The benefits of topic-based authoring can be compelling, with findings from the DITA and the Technical Communicator’s Transformation study indicating that when pursued the right way, topic-based authoring can have a broad range of benefits, enabling an organization to meet authoring and localization cost targets as well as documentation quality expectations, among others. However, as the adoption of this approach spreads, the advantages seen by today’s leading organizations will flatten out. This Sector Insight provides a guide for current adoption of topic-based authoring and those still considering it; outlining the changes that are expected to take place in as topic-based authoring goes mainstream. View this research document at [www.aberdeen.com/summary/report/researchbriefs/5678-RB-technical-publications-customization.asp](http://www.aberdeen.com/summary/report/researchbriefs/5678-RB-technical-publications-customization.asp).

Here are some other interesting and relevant research papers:

- **The Technical Communicator’s Transformation: Publishing On-time and On-quality**
  Making the transition to a topic-based approach to authoring can require a dramatic shift in the day-to-day operations of a technical communications organization. This report provides a guide to best practices for implementing topic-based authoring.

- **Dynamic Publishing: Smart Documents Streamline Technical Documentation**
  While it’s an emerging goal, creating targeted documentation to specific markets, customers, or even product configurations can seem like a daunting task. While many technical
communications departments struggle with the puzzle of customization, some have found ways to do so while still meeting departmental metrics on a 97 percent or better average.

• **Publishing Technical Communications to a Multi-channel World**
  The days when technical communications only consisted of paper manuals are over. Increasingly, product documentation is delivered through electronic, web, and even mobile devices. Publishing to all of these channels is challenging, but doesn’t have to be burdensome.

• **Next-Generation Product Documentation: Getting Past the “Throw It Over the Wall” Approach**
  The growing volume of product information that must be published when a product goes to market is leading some companies to miss product launches and publication dates. For others, failing to keep documentation current with product changes is resulting in inaccurate publications and disgruntled customers. This benchmark report examines the approaches organizations are adopting to tackle these issues and which are the most successful.

• **3D as Structured Documentation Content: The Tipping Point for PLM and CMS Convergence?**
  Companies are now realizing that using 3D design data in non-engineering organizations is proving to be a hidden key in achieving top-line growth. 3D graphics as structured content implies a need for integration of both product data management and content management systems to keep up with work-in-process changes to support concurrent development.

• **Is Incremental Translation the Answer to the Documentation Localization Crunch?**
  When it comes to the translation and localization of product documentation, technical communication departments find themselves not only with more projects but also with less time to complete them. Some have begun to take advantage of structured authoring tools in an innovative way to begin translation projects earlier through “incremental” approaches.

• **3D Publishing: Extending PLM Collaboration Downstream**
  The use of 3D CAD models to create downstream deliverables, such as manufacturing instructions, product documentation, and sales and marketing tools is expanding. This report explains how 3D publishing reduces time to market and decreases the costs of producing these downstream deliverables. It also discusses processes that can be enabled with 3D publishing, such as automating content development and changes to content as the product design changes.

Access to Aberdeen’s research is valued at $995 per user, but, through the partnership with STC, is available to all members free of charge for one year. Your private access to a world of fact-based research can be accessed at [http://resources.aberdeen.com/epubs/html/email/access/STC_ComplimentaryAccess.html](http://resources.aberdeen.com/epubs/html/email/access/STC_ComplimentaryAccess.html).

**STC’s Corporate Value Program**

STC’s Corporate Value Program (CVP) was established to meet the needs of companies that hire technical communicators. The CVP offers a variety of options, and companies can choose between memberships for all staff or just a few employees. Among the benefits of CVP membership are the following:

• E-memberships for company employees, which includes access to STC’s members-only knowledge base
• Transferable memberships if employees leave the company
• Special CVP rates on STC training and education offerings, including live web seminars
• Special CVP rates on STC exhibits and sponsorship benefits at the Technical Communication Summit
• Recognition on the homepage of STC.org
• Special CVP rates on advertising in STC online and print publications

A full list of benefits is available at [www.stc.org/membership/cvp01.asp](http://www.stc.org/membership/cvp01.asp). STC members are encouraged to tell their managers about the benefits and possibilities of the CVP program. If your company pays for STC memberships for you and your coworkers, you may end up saving money for your company. To learn more about the CVP program, please contact Stacey O’Donnell, membership development manager, at stacey.odonnell@stc.org.
Resources for STC Leaders

STC wouldn’t be the world’s largest professional association for technical communicators without the dedication and commitment of its volunteer leaders. If you’re a newly elected chapter or SIG leader, STC has several resources to help you perform your duties.

Your most important resource will be your contacts at the STC office: Diana Buttram, chief operating officer and director of community relations, who can be reached at +1 (571) 366-1919 or diana.buttram@stc.org, as well as Omar Terrie, assistant manager of community relations, who can be reached at +1 (571) 366-1918 or omar.terrie@stc.org.

News & Notes: Leadership News Section

Published every month, News & Notes is STC’s electronic newsletter. Beginning January 2009, STC decided to absorb Tieline into News & Notes, thus each issue of News & Notes contains a section entitled “Tieline: Leadership News,” which provides relevant and timely information and articles for chapter, SIG, and Society leaders. Each issue contains Society news and announcements, reminders of important deadlines, other essential administrative information, as well as articles by leaders on best practices and new approaches to leadership within the Society. The Leadership News section also publishes feature articles that describe community events and initiatives.

News & Notes is emailed monthly to all members, with the Leadership News section as a special area for chapter leaders, SIG managers, and Society-level volunteers and elected officials to look to for the latest leadership news. The Tieline knowledge base at www.stc-cdx.org/tieline provides access to Tieline feature articles published from 2006 to present, while all News & Notes newsletters are archived in PDF format at www.stc.org/stc-members/newsNotes01.asp.

STC Community Handbook

Assembled and edited by the Leadership Community Resource (LCR), the STC Community Handbook is a comprehensive resource on running an STC community. The handbook contains practical tips for leading volunteers, managing chapter finances, creating quality programs, handling public relations, getting and keeping members, and more. A PDF of the handbook can be downloaded from www.stc.org/lcr/index.asp.

LCR Web Page

In addition to the STC Community Handbook, the LCR section of the STC website features a Leadership Toolkit area and a Leadership Training area. Content includes the LCR Process Flow Chart (a resource that shows how to engage the LCR for support), New Leaders—Start Here (providing discussion lists and other important information), and the Leadership Workshop (an online training resource for anyone in STC entering into a leadership role or wanting to do so). View the LCR webpage at www.stc.org/lcr/index.asp.

SIG Activity Quick Reference

This timeline is designed to help SIG managers plan activities and accomplish essential tasks. View the timeline at www.stc.org/stcmembers/sigReference01.asp.

Calendar for Community Leaders

A new addition to the LCR page, this Google calendar provides an overview of important dates and deadlines for leaders. The calendar can be found at www.stc.org/LCR/calendar.asp. For more information or to request certain dates or deadlines be added to the calendar, please contact Omar Terrie at omar.terrie@stc.org.

Bookkeeping Materials

The chapter finances page at www.stc.org/stcmembers/chFinances01.asp contains links to financial report forms and instructions for both regular and student chapters, as well as bank reconciliation forms and sample workbooks.

Administrative Documents

Official STC guidelines for Society-level committees and officers, competitions, programs, and SIGs can be downloaded from www.stc.org/stcmembers/adminDocs01.asp. Links to PDFs of the STC Bylaws and Articles of Incorporation can also be found on this page.

Advance your career. Don’t interrupt it.

Mercer’s Online Master of Science in Technical Communication Management

“...the structure of the program allowed interaction with classmates around the globe. By using advanced communication technology to bridge time zones and cultures to do school projects, I had an excellent foundation to be productive in a global company where I literally have to interact with colleagues on several different continents on a daily basis.”

Becky Roberts
2000 Graduate
Senior Channel Marketing Manager
Genesys Telecommunications Laboratories, Inc.
Daly City, California

Students may begin the program in August, January, or May.
Chapter Renewal Challenge Winners Announced

In February, STC asked its professional chapters to help boost the association’s overall renewal rate by encouraging local members to renew their memberships prior to the 20 March deadline. (The STC membership year runs from January to December; however, members are permitted a ninety-day grace period before being dropped from the rolls for non-payment.)

For the chapter challenge, chapters were grouped into six size categories, from fewer than 40 members to more than 601, following the same groupings for community awards. To be eligible to win prizes, a chapter had to reach a qualifying renewal rate of 70 percent.

The chapters with the highest renewal rates, as well as those able to exceed the 70 percent renewal rate, are listed below. Prizes for the Chapter Renewal Challenge included one 19” flat screen LCD television, one Epson Stylus Multifunction Photo Printer/Copier/Scanner, two $50 gift cards for Amazon.com, and two free registrations to STC’s 2009 Technical Communication Summit in Atlanta, GA.

Congratulations to the winning chapters who reached a renewal rate of 70 percent, and thanks to all chapter leaders for contributing to the health of the Society.

Category: 601 or more members
Silicon Valley, 57.66 percent

Category: 301 to 600 members
Boston, 66.72 percent

Category: 151 to 300 members
Carolina, 61.68 percent

Category: 76 to 150 members
Northeast Ohio, 73.24 percent

Category: 41 to 75 members
Manitoba, 76.19 percent

Category: 15 to 40 members
Southern Nevada, 78.38 percent

Although the following chapters did not win in their categories, STC congratulates them on reaching and exceeding the 70 percent renewal rate: Rochester, 71.96 percent; Charlotte Regional, 73.33 percent; Trans-Alpine, 71.23 percent; and Australia, 70.59 percent.

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Couldn’t Attend the Summit Because of Travel Funds? Now You Can

The 2009 Technical Communication Summit held the first week of May in Atlanta, GA, may have just ended, but you can still attend all the sessions without traveling from your home or office.

The content of more than 100 sessions was captured (audio and visuals) and will soon be available on the STC website (www.stc.org). Only panel discussions and workshop sessions were excluded. The sessions and PowerPoint images will be accessible from SUMMIT@aClick, STC’s newest benefit for members. A free demonstration of the technology is available on the website now.

With access to SUMMIT@aClick, individuals who would normally be able to physically attend only eight to ten sessions during the conference will now be able to view the sessions they missed or revisit the ones they attended to refresh their memory of the points made by the speakers. STC’s Summit is the only meeting in the technical communication field that offers this added bonus.

2009–2010 STC President Cindy Currie explains how SUMMIT@aClick creates a richer educational experience. “I’ve attended the annual conference for years, and each time I wrestled with choosing which of the many concurrent sessions to attend. There were so many good ones to choose from that I always felt I missed out on some great presentations, no matter which I chose. Now, with access to SUMMIT@aClick, I am able to see and hear all of the sessions that interest me, and I can access them at the time and place I choose.”

STC also continued its tradition of publishing printed proceedings (papers submitted in advance of the meeting by presenters). “I appreciate the limited value of the proceedings, but they cannot capture the energy or dynamic interaction of the presentations or the important questions and answers that follow,” adds Currie.

“I appreciate how hard our speakers worked to ensure this first capturing of content would be a success,” said Lloyd Tucker, STC director of education and membership. “We also had a great audio-visual crew that really hustled to get all the sessions captured. It should only take a few weeks to complete some post-production work before we make the sessions available online.”

SUMMIT@aClick is included in the full registration fee. Attendees will receive a password to access the content at no additional charge. Members who did not attend the Summit may purchase access to it online. The price for SUMMIT@aClick is $795; however, it is being offered at an introductory advance price of $595 until 30 September.
Social media has transformed the way we communicate. This column discusses the intricacies and ramifications that social media has on our everyday personal and professional lives. Suggestions for topics you’d like explored are welcome.

The Generational Effect on Social Media

BY RICH MAGGIANI, Fellow

The year you were born has a profound effect on how well you “get” social media and how comfortable you feel communicating through its numerous channels. The generations—Baby Boomers, Gen X, and Gen Y—all perceive and employ social media in markedly different ways. Understanding how these generations grew up sheds light on why this is so. It’s enlightening to appreciate everyone’s background and where people are coming from, since these are the people you communicate with every day.

Baby Boomers. Most Baby Boomers simply don’t get social media. And why should they? Born at least 50 years ago, Boomers grew up when the interstate highway system was just being built; when many telephones were shared party lines; when calling long-distance required operator assistance and was saved for Sunday afternoons (reserved for the few family members living out of town); when all your friends lived in your neighborhood and you went to their house to talk with them; when television was black and white, had only three stations, and was only broadcast during the day; when letters were written regularly; when essay test questions were answered by hand in “blue books”; when the library was for conducting research; and when record players spun 45s of Elvis embodying the breathtaking new sound of rock ‘n’ roll.

In that existence was a lot of time for personal interaction, face-to-face talking, and the patience for waiting. Social media is alien to that Boomer existence. Boomers ask: Where’s my privacy? How can I thrive with all these interruptions? Can’t I just talk to you? Do I really need to know what you are doing right now?!

Gen X. For this transitional generation, social media is a bit easier to get, but still, there is a bit of detachment. Gen Xers, now in their 30s and 40s, grew up with the proliferation of computers; with green screen terminals morphing into desktop computers; when email, word processors, and desktop publishing spawned electronic communication; when the World Wide Web was liberated from the dusty halls of academia; when work environments increasingly became international and neighborhoods became developments; when television transformed into 24-hour cable with its incumbent dozens of channels; when overnight delivery mushroomed; when essay answers were written on word processors; and when Elvis acted in B movies and crooned formula tunes on tacky, remote beach sets.

Gen Xers border the simpler lives of their Boomer parents, as well as the convoluted lives of their Gen Y children. Gen Xers began the transition from interpersonal to electronic communication, so they can more easily accept the constant communication by machine and the interruptive nature and eroding of privacy engendered by social media.

Gen Y. Born plugged in, Gen Y is digitally active and about to turn 30. For them, everything is now. For their entire lives, everything has been computerized; physical boundaries have never existed, enabling global awareness; mobile phones have keyboards, so communication by voice, text, and images is immediate; long distance is irrelevant; Internet access has always been at their fingertips, replacing archaic cable television and libraries; eroding physical neighborhoods have been replaced with online social networks of friends, many of whom are not physically known, with varying levels of privilege—yet these friends mean everything; essay answers are emailed to teachers; music is downloaded, transported, and played on devices not much bigger then a credit card; and they ask: Elvis who?

Perhaps there has never been a generation of teenagers and 20-year-olds who have had such a profound influence on society as Gen Y. They get social media because they live it every moment; they created it and continue to define it.

Where does that leave us? The metamorphosis caused by social media wreaks a measure of tumult on communication that is at once both arresting and exhilarating. Troublesome issues of interruptions, privacy, immediacy, and checks and balances have all surfaced. Clearly, the different generations
“Our youngest generation sets the tone while the rest of us struggle to engage.”

Interruptions. Constant. And it’s expected that you will allow yourself to be interrupted. Forgetting your mobile phone borders on panic. It’s not uncommon to respond to a text message while watching a movie and surfing the Internet. As a result, everyone’s attention span is becoming shorter and shorter. Communication must be short and visual, thus the rapid advent of text messaging, microblogging, and video blogging.

Privacy. Gone. What happened to it? Social networking sites, blogging, and streaming video enabled showcasing the intricacies of your personal and professional life to the world. Boomers see this as eroding privacy; Gen X doesn’t mind; Gen Y embraces it. After all, only your “friends” are seeing it, right? This rampant indifference for privacy has suffered some blows lately, as seedy revelations posted on people’s networking pages have had a negative impact on their livelihoods.

Immediacy. It used to be that when your phone call went unanswered, only you knew. There was a certain finality in it. You moved on. Then answering machines came along. While initial adopters were considered pariahs (must I talk to a machine?), answering machines became essential and expected to the point where only pariahs didn’t own one. Now contact seems instantaneous and unavoidable. With caller ID, missed call logs, text messages, picture messages, email, instant messenger, and social network mail, it is. And this all happened without any transition period.

Checks and balances. What ever happened to editors? Online postings are rife with typographical errors, grammatical mistakes, and misused words. When this is passing for journalism, the quality and accuracy of content becomes questionable. Postings littered with links oftentimes give readers the illusion of well-researched thought, when in actuality what you are reading is simply myopic ramblings.

How are you coping with it all?

The bottom line. Our youngest generation sets the tone while the rest of us struggle to engage. Baby Boomers created television. Gen Xers took television to the next level of cable and satellite, and watched the spawning of an Internet accessible to everyone. Gen Y is taking the Internet and the World Wide Web to the next level—social media.

Author’s Note: Welcome. Thanks for reading! This is the first entry in Intercom’s “Social Media Insights” column. I hope you found it enlightening. While I have many ideas for future columns, I want this to be your column, and so I encourage you to send me your comments, suggestions, and ideas at rich.maggiani@solari.net.

Rich Maggiani (rich.maggiani@solari.net) is a communication consultant and president of Solari Communication (www.solari.net). He views the world as metaphor, as that enables him to bring clear communication to an otherwise noisy world. He writes extensively, teaches communication skills, creates communication plans, and speaks on a variety of communication topics. And, of course, he is extremely keen on social media: follow him on Twitter; connect with him on LinkedIn. Rich is an STC Fellow, a co-founder of the Vermont Chapter, and a Director-at-Large on STC’s Board.

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“Telescoping” to Survive This Recession

BY ELIZABETH G. (BETTE) FRICK, ASSOCIATE FELLOW

One of the many advantages of aging is that I’ve survived several US recessions (1973–1975, 1980–1982, 1990–1991, 2001–2003, 2007–present, according to Wikipedia). Unfortunately, my advancing age means that I can barely remember what I did to survive these hard times. (I’m only partially kidding here. I do know that in the past, I’ve personalized the slowdown in work more than I should have.)

That’s when I decided to survey fellow Consulting and Independent Contracting (CIC) SIG members to see what strategies all of us were using to thrive in this economy. I used a quote from Paul and Sarah Edwards in the December 2008 issue of The Costco Connection as the basis for the survey: “When times are good and money is flowing, specialize; when times are not so good and money is tight, telescope. Telescoping is our marketing rule of thumb for extending or adding to the range of services you provide to existing customers without undoing your reputation in the business specialty you have developed. It means observing and listening for things your clients need that you could offer to do for them more economically than they could do for themselves or by turning to other specialists.”

Twenty-two independents responded and nineteen completed the survey. Nearly three-quarters of us (72.7 percent) are telescoping our offerings, and this article will share what we are doing to expand our services and how we’re doing that. I’ll share your concerns about the process and conclude with some hopeful stories. (Some have referred to this process as diversification.)

What We Are Doing to Telescope

Katherine Noftiz Nagel (Masterwork Consulting) is offering training to her documentation and online help clients and site maintenance to web design clients. Mindy Hoffbauer (Write Angle Consulting Inc.) has expanded into marcomm (marketing communications), corporate communications, branding, corporate identity, and public relations. Another training and coaching specialist is attempting to add writing as an additional service line, and another is adding proposals, grant applications, and publicity.

Beryl Gray (Beryl Gray Technical) says, “I added greatly increased options for document delivery. Where I usually provide source files and printable files, I now include file (or paper) delivery to a press agency, printer, or the customer’s customer. I try to anticipate what value I desired as a customer of a writing consultant.”

Andrea C. Carrero adds: “I have broadened my services to offer marketing and other business-related communication services. I am a former journalist, have done public relations, and have a wealth of publication experience behind me, in addition to a really deep technical knowledge. This allows me to offer a wide variety of services to a wide variety of clients.”

Screencasting has helped Holly Mullins (Web Prose LLC) to offer her clients screencast demos and tutorials as a service line, and she continues to work to expand her services in e-learning into the biomedical communication field.

How We Are Learning to Expand Our Services

We are learning new tools, getting certifications, offering classes, joining new professional organizations, networking endlessly, becoming more visible through leadership roles, and revisiting former market segments.

Chris Keefer (K2 Communications) writes, “I’m in the process of updating my skills in creative tools such as Dreamweaver and InDesign so that I can offer clients consistent content that works for both print and online media. By multipurposing the content, clients get more value for their dollar.” Along the same lines, Hal Gill has acquired training for the Project Management Professional certification and plans to complete the PMP exam.

Ginny Redish (Redish & Associates) says, “Twice recently, I gave a workshop on writing for the web for a client where I made a point of putting the idea into the client’s mind that I could also help by mentoring content writers individually. Both clients have now come back to me and asked for that service.”

Some of us are diversifying our professional organizations to increase our contacts and specialties. Chris Keefer says, “I joined my local Chamber of Commerce to get to know small- and medium-sized business owners. I volunteer my services as the marketing and communications committee chairperson, which has opened doors to working with other communications professionals, extending my professional network, and finding new work with the members.”
It’s been a big investment of my time and energy, but well worth the effort.”

Networking never goes out of style, according to Mindy Hoffbauer: “I never quit networking. In both good times and not so good, I continue to network everywhere I go: at STC meetings, charity events, on my kids’ soccer field, through my volunteering activities… I’ve never had to go looking for work.”

Leadership roles are invaluable long-term assets in stabilizing income, as Linda Gallagher shares: “It helps to have been around for 15+ years and taken visible leadership roles, mostly in STC. Of course, I do have lulls, but my income has remained fairly stable over many years.”

Beryl Gray suggests: “I have revisited market segments in which I have previously worked but left for more profitable (or more comfortable) segments.”

**Concerns**

Lyn Worthen (Information Design Co.) cautions us not to use telescoping as a crisis-management tool: “While the idea of ‘telescoping’ isn’t a bad one, too many people will suddenly try to offer additional services during lean times that they haven’t refined when times were more stable. As a result, they can actually end up causing their reputation the very damage the article was warning about. If you have a strong skill that you’re not currently offering (maybe it’s not your favorite thing, or an area you find you’ve not worked in for a while, but still are competent in), sure, extend your services in that area to increase your chances of staying employed during lean times. But don’t decide to pick up a new skill and try to market it now, out of desperation.”

Linda Gallagher (TechCom Plus, LLC) adds that she’s “not really comfortable and get[s] rather stressed by trying to be a marketing writer or article author or other type of writer that is outside what I know I’m good at.” Another independent worried that a tight economy might not be the best time to sell a new service.

**Some Hopeful Telescoping Stories**

An unidentified respondent shared a very positive experience with telescoping: “I am a copyeditor/proofreader. A current client asked if I could help with ad copy, and I replied that it wasn’t my area of expertise, but that I was willing to do whatever it took to get the job done. It worked out well! I did consult with another coworker whose specialty is marketing communications. She gave me her quick-and-dirty 20-minute lesson in how to write ad copy. I followed suit and my client was very pleased. Oh, I think I got lucky, too!”

Another anonymous contributor said, “I’m a freelance technical writer and have been working with one client for the past four years. This client had a layoff in November and has since asked me to write product specification and marketing brochures in addition to keeping the doc current. I’m really enjoying the change of pace and the opportunity to prove how valuable I can be to this client.”

Tony Chung (Creative Communications) writes of the exhilaration of telescoping: “I took on some web design and programming contracts that are still keeping me busy even though I’ve started a new full-time writing contract. Things are getting exciting because I have also been asked to flex my artistic and multimedia muscles, further telescoping into other areas of interest that I’ve always wanted to explore.”

Beyond telescoping, Carol Elkins (A Written Word) writes: “Consider providing additional services throughout the life of a contract so that when times get lean, a client is more ‘invested’ in your services and less able to cut back. For instance, I provide web hosting services for my client because his IT department can’t seem to get it right; I provide my client with several HTML-based ‘desk references’ that his department relies on now for information; and I developed some weekly updating services that the entire rail industry now relies on. All of these extra things require routine updating that my client is happy to pay for. So although he sees a cutback in my writing services, he finds it much harder to escape from the routine fees he pays me to maintain these now ‘necessary’ additional services.”

**Conclusion**

I have two quotes over my desk:

1. “The best way to predict the future is to invent it.”
   (Alan Kay)
2. “Try again. Fail again. Fail better.” (Samuel Beckett)

Respondents to the survey appeared to agree with these sentiments. Mindy Hoffbauer says, “The only time I experience personal or professional growth is when I push the envelope. Telescoping can sometimes involve stepping outside our comfort zones, but it always pays off.”

An anonymous responder summed up this discussion: “The essential law of economics as well as nature is that we must adapt to conditions as opposed to standing still and hoping that conditions change to make our present situation relevant. In the current economy, businesses are working to become leaner, so all professionals who want to stay employed must adapt to add value to their organizations. This is nothing new.”

Elizabeth G. (Bette) Frick, the Text Doctor (efrick@textdoctor.com), teaches technical and business writing in Denver companies and in companies and organizations both nationally and internationally. Her interactive classes and practical workshops help everyone improve communication skills. She holds a PhD in English from the University of Minnesota. She served as president of the STC Twin Cities Chapter (2003–2004) and recently served the Rocky Mountain Chapter as seminar manager. Bette has recently been named an Associate Fellow of STC.
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<td>The American Medical Writers Association (AMWA) will hold its annual conference, “Blazing the Trail,” in Dallas, TX. For more information, contact: Dane Russo +1 (301) 294-5303 <a href="mailto:amwa@amwa.org">amwa@amwa.org</a> <a href="http://www.amwa.org/default.asp?id=433">www.amwa.org/default.asp?id=433</a></td>
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With a passion for writing that extends far beyond technical writing, Senior Member Gretchen Stahlman has taken her love of the written word to a whole new level.

Gretchen Stahlman was always good at writing in school. “I was one of those students who could write the term paper the night before it was due and still get an A,” she says. However, she went to college to pursue a degree in computer science. Although she had wanted to be a columnist, she became a programmer instead. She didn’t enjoy the work, but she did enjoy writing the specifications and user guides, so she migrated into the realm of technical communication. “Technical writing was a way for me to get used to putting words on paper, crafting sentences, and writing in a concise way,” she says. “Even though I wasn’t writing about myself or my life, it was a comfortable way to get into writing. Tech writers are actually very creative; they have to figure out how to present the information—it’s great training for any kind of writing. Every word matters and it really teaches you to say exactly what you mean.”

After 9/11, Gretchen’s son declared he wanted to enlist in the armed forces. After he graduated from high school, he joined the Marines. During this time, Gretchen wrote about the trials and tribulations of having a son in the armed forces—about not only accepting it, but supporting him, and coming to terms with his enlistment. She compiled a series of essays, many of which were featured on her blog, with the hopes of getting the essays published in book form. At that point she had an agent who was interested in the book, and it was almost complete. Then, the unthinkable happened: her son deployed to Iraq and everything fell apart for Gretchen. She didn’t push her book very hard, but she continued to write, as writing had now become an excellent release for her—a way to cope with a son in the war. “If you don’t have a [family member] in the military,” she says, “you forget it’s all going on. I wanted people to understand that families, not just those [individuals] who are deployed, are affected.”

Her son did two deployments for seven months in Iraq and is now back in the United States and pursuing a college degree. Even though she did not originally want him to enlist, Gretchen is “very grateful for the war experience … it completely opened my eyes to an area I would have never known anything about and it helped me grow as a writer. I write about ordinary people and how extraordinary their lives are.”

After the dotcom crash, Gretchen decided to change her priorities in life. She discovered that writing was such an important component of her life that she decided to work to make just enough money to pay the bills so she’d have enough time to do the writing she so loved. Two years ago, she applied to the MFA program at Pacific Lutheran University in Tacoma, Washington. She was accepted into the program and began this year. The program is a low-residency program, designed for those with full-time jobs. She goes to Tacoma for ten days every summer where she attends classes and readings, and throughout the year she works one-on-one with a mentor. She is thinking of continuing her studies in non-fiction.

Gretchen is currently still working on essays, but now she has a whole new area to explore. During her son’s deployment she really needed a way to cope; she tried comfort food, but “no matter how many cookies I ate, he still went to Iraq.” It really didn’t solve the problem. So she completely overhauled her life and started running. In 2007 she ran the Marine 10K. She got marathon fever and in the spring she ran the Marine half marathon and then eventually she worked up the endurance to run the Marine full marathon last October. Now she is training for triathlons (including a 70.3 Ironman) and her writing has followed suit. Her essays revolve around swimming, biking, and running: learning, training, practice, and especially where the mind wanders during those lengthy and often mind-numbing long swims, rides, and runs.

Of course Gretchen does hope that her devotion to writing pays off at some point in the form of publication. When she gets discouraged with her slow success, she thinks she could quit the writing and just work full time. “But then I realize that I really couldn’t do it. [Writing] brings so much meaning and value that even if [my work] is never published, what matters is that I’m doing this writing and trying to be the best writer I can be.”
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