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Technical Communication’s Value Proposition: Providing Value & Return on Investment
By Rahel Anne Bailie
Long gone are the days of measuring by page count or errors per page; even using reduced support calls as a measure of value seems rudimentary. The user-experience factor is an important part of the customer’s decision-making process, ensuring that technical content remains relevant and is delivered in ways that show clear ROI. This article explores some of the traditional and emerging ways the value of technical communication is expressed.

Enhancing the Perceived Value of Your Technical Communication Department in Hard Times
By Hannah R. Kirk
What can we do to demonstrate our value? This article is intended to empower all technical communicators—both managers and individual contributors—to take action in this dialogue. Kirk provides some guidelines and suggestions on how to promote your technical communication team.

Measuring the Value of Technical Communication in Economic Terms
By George Slaughter
Understanding the importance of technical communication is different from quantifying its value in economic terms. Discerning the difference and communicating it may help technical communicators demonstrate the value of their work during the next budget cycle.

A Different Perspective on Measuring the Value of Technical Communication
By Ellis Pratt
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Progressive User Adoption
By Michael Hughes
Many technology companies think of user adoption as an ultimatum. This article offers an alternate view—progressive user adoption—and how user assistance can be used to promote it.

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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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The very idea that we may be called upon to demonstrate the value of our work is, for some, a panic-inducing proposition. For others, particularly consultants, it’s just part of a day’s work. Whether you fall at either end of the spectrum or somewhere in between, one thing is certain: measuring the value of the content we produce was never a strong point for technical communication departments. We’ve gotten better at it during this decade, and the way that we measure that value is changing faster than ever. My own encounter with proving the value of technical content was in my first technical communication job, in the late 1980s. I had never heard of the terms Return on Investment (ROI) or Internal Rate of Return (IRR). The formula divided the anticipated return (AR) minus the investment cost (IC) by a period of time (T), over a commitment level of the corporate decision-maker (CCD) divided by 100:

\[
pROI = \frac{AR - IC}{T \times \frac{CCD}{100}}
\]

What I wanted to demonstrate was that factors, such as executive commitment, could have a profound impact on our ability to create value from our technical communication efforts.

What Constitutes Value?

Before we can measure value, we need to have a common definition of it. As our profession and the processes around managing content lifecycles have matured, the idea of what constitutes value has changed (see [www.comtech-serv.com/pdfs/1PMU_update_04.pdf](http://www.comtech-serv.com/pdfs/1PMU_update_04.pdf) and [www.stc.org/edu/50thConf/dataShow.asp?ID=14](http://www.stc.org/edu/50thConf/dataShow.asp?ID=14)).

1980s: We thought of content value in terms of elegance and accuracy. Many a performance review used internal metrics, such as Pages per Function or Average Typos per Page, to measure the value of the documentation produced. The problem with this type of measurement was that it was self-referential. The efforts spent on creating documentation aspects, such as transitional content, were used to assess perceived value of the documentation. This didn’t matter to management. These measures would have been important had the documentation been evaluated for sale as an independent item. Because the documen-
tation was to support a primary product, however, what mattered was how to manage the cost of the product. The overall value to the corporation was measured in terms of how much the documentation cost to produce. The lower the cost, the greater the corporate value.

1990s: As the adoption of alternate forms of publishing became prevalent, such as online help and content published to the web in PDF format, the definition of value began to change. Manuals became part of the larger category of user support material. Its value was measured in the ability to save money for the company—in other words, IRR (Internal Rate of Return). Success factors ranged from decreased support costs, to decreased time to market, to content update efficiencies and similar measures. What they have in common is a relationship to savings and efficiency. In fact, for many organizations today, it still makes sense to discuss value in these terms.

2000s: The measure of value of content in organizations today is focused on its role in gaining market share—in other words, ROI. The move to collaborative technologies, sometimes associated with Web 2.0, is increasingly impacting how business is transacted. The idea that technical documentation is a silo confined to the technical communications group is losing its hold. There is more recognition that, at some level, everything is a marketing issue. This is reflected in such books as Karen Donoghue’s *Built for Use: Driving Profitability Through the User Experience*, which connects the dots between product sales and product experience.

**Content as Asset**

Christopher Cashdollar, Creative Director of Happy Cog Studios, noted that, “Nothing can deter confidence quicker than a broken experience,” and with social media, broken experiences can damage brands faster than ever. If we can agree that all customer-facing content is an integral part of a user experience, this statement has two sides to it. The first recognizes that substandard content can damage a brand. The second is that good content, served to a customer in the right context, can enhance a brand. This changes the very nature of content: from a cheap-as-possible, necessary evil to a brand-enhancing, valued asset.

Part of the shift is driven by the technological ability to create content that users want and value. The music industry is one such example. No one in the industry is trying to make money by serving up fewer song tracks. Even though the bulk of the music revenue comes from a small percentage of high-profile artists, the industry thrives on providing a large variety of content. Other high-profile examples, from BabyCenter to All Music Group (AMG), are sites that serve up editorial content as their main feature and derive their revenue from adjunct product sales. What these industries have in common is asset-valued content. It’s content that can be re-used and presented to customers in multiple contexts.

To use a crude metaphor from the environmental movement, the value of content resembles the changes in consumer product usage. Some content is like single-use tissue: use once and toss. Think paper towels. They must be cheap to create, only sturdy enough as a one-time use demands, and painless to throw away. On the other hand, there are linen napkins. These cost more to create but can be used again and again, and their disposal is a considered decision. Paper towels are an operating expense; napkins are an asset, and likewise for content.

The question, then, becomes how to turn content from a limited-value, single-use product into a valued asset. The content may not be as entertaining as a music track, or as primary as a site whose business model is the delivery of editorial content. This doesn’t mean that user support content can’t be engaging or informative. Companies with the driest of technical content have found a way to deliver its content in ways that enhance customer loyalty. An example is Hewlett-Packard’s support site, where the customer experience is enhanced by having all the information for a product accessible from a single page (see Figure 1).

It is apparent that the site has been designed with customer experience in mind—in essence, a product portal—but the portal concept would fall flat if a customer could not locate the expected content. The content has become an integral aspect of the customer experience. With each transaction generated because of user loyalty (ROI), the content value increases. The IRR is from the ability to single-source content for re-use to multiple presentation-layer areas.

In addition, by managing the content well, it can be delivered in multiple places. For example, all the drivers can be listed together, as well as listed on the appro-

**Figure 1.** HP uses content assets creatively to deliver a rich user experience.
propriate product page; all the manuals can be shown together on a single page, as well as listed on the appropriate page. With each instance of re-use, the value of the content asset increases.

**Different Organizations, Different Values**

How content is valued within an organization may not be reflective of the content potential. The value of content within an organization is certainly influenced by the business drivers that matter to the executive team in a given year or stage of operations. By determining the high-level corporate goal and working backward to the operational level, there is more likelihood of getting support for the initiatives to raise the content value.

For example, you may want a content management system to be able to single-source your content for tracking translations. That may not resonate with the executive team that controls the purse strings. However, if the current corporate initiative is to enter the European market by a certain date, you’ve just been shown the path to make your case.

You need to determine the expected benefit that the corporation hopes to achieve by entering the European market. To enter the European market, translations into 20+ languages are required. To handle that many translations within the time period, you need to automate content tracking. To automate content tracking, you require a tool, a CMS. Calculate either the ROI or IRR of the investment in the CMS in relation to the projected revenues. This can be expressed as entry barriers (language), which affects level of service, which affects market attractiveness, which affects profitability. The “fix” is removing the entry barrier—in other words, getting your documentation produced in a way that will ease entry into the new market.

Examples of typical business drivers, and how they lead to the bottom line, are shown in Figure 2.

**Calculating Content Value**

The valuation of content is based on basic business principles, and, while situation-specific, value can be measured in two ways.

**Revenue-generating Activities**

ROI can be explained with the following general principles:

- Organizations exist to earn profits by generating revenue.
- Organizations value initiatives that generate revenue leading to profit.
- Organizations support what they value.
- Organizations financially invest in activities they support.

To be sure to get a return on any investment, organizations will use some form of measurement to determine whether the eventual increase in revenue is worth the investment. The main concerns will be whether the cost of the investment will be realized by generating revenue within an acceptable period of time.

**Cost-saving Activities**

IRR can be explained with the following general principles:

- Organizations exist to earn profits by minimizing costs.
- Organizations value initiatives that minimize expenses leading to profit.
- Organizations support what they value.
- Organizations financially invest in activities they support.

To be sure to get a return on any investment, organizations will use some form of measurement to determine whether the reduction in expenses is enough to warrant the investment. The main concerns will be whether the investment can be recouped in an acceptable period of time.

What should be obvious is that to be able to do these calculations, some metrics must be collected. For metrics to be useful, they must be expressed in the same way that the organization expresses other metrics. I would encourage you to meet with the bean counters and ask for their help in identifying metrics, such as labor or overhead costs, and when to include them. Involving your finance partners in the calculations is good business practice, since you are also sharing information, and often actively garnering support for your content valuation.

**Value in the Coming Decade**

Like any good marketing initiative, value is a moving target. The way we measure value today will seem a little outdated and stale by the time the decade of 2010 gets underway. I don’t pretend to have a crystal ball, but I am watching some trends. Here are a few predictions based on my observations:

- **Alternate forms of supporting users.** Buying a product that has no accompanying documentation will become commonplace. That doesn’t mean lack of user support. YouTube videos, instructive labeling, wizards, and user-generated content will be the primary sources of information. A technical communicator’s role is to ensure that the content created is the most helpful content in the best medium.

---

*Figure 2. Typical business drivers with a common goal of corporate profitability.*
hear “we don’t do documentation—
we just fix the problem.” My predic-
tion is that there will be a need for
explanation of features and functions
as the successful products grow and
mature. The question will be whether
that explanation takes the form of
what we would call documentation,
or whether the Millennial Generation
(users just entering adulthood, who
will form the bulk of the user base for
these new sites and products) expects
more useful, entertaining, low-intru-
sion ways of getting their support.
The single unifying lesson in deter-
mining the value of technical communi-
ca
cation is that user success delivers brand
promise, and technical communicators
are in a good position to bolster, and
even drive, those efforts. If we keep
an eye on the ever-evolving marketing
landscape and watch for opportunities
to enhance the organizational brand,
we can ensure our role in the organiza-
tion’s future.

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mac
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tion strategist for the STC Canada West Coast
Chapter for a number of years. She was elected
Fello
w of STC in 2009.

ROI: A general formula involves calculating the Net Present Value of the ben-
etit in current terms, based on a time horizon of n and an opportunity cost
of k:

$$NPV = \text{future value of benefit} \times \frac{n}{(1+k)^n}$$

Subtract the incremental costs and divide by the costs:

$$ROI = \frac{NPV - \text{cost}}{\text{cost}}$$

IRR: A general formula involves calculating the cash flow (CF) and number of
periods (n) at a given interest rate to return to 0:

$$0 = CF_0 + \frac{CF_1}{(1+r)^1} + \frac{CF_2}{(1+r)^2} + \frac{CF_n}{(1+r)^n}$$

These formulas are from Karen Donoghue’s book Built for Use.

• User-generated content. Leveraging user-generated content to enhance a
brand is already happening. The move-
ment to incorporate user-generated content into user support content in a
reliable, meaningful way is in its infancy
and will become a powerful way of
staying current with customer need for
content. The impetus for this has be-
gen with management of online com-
unities, and there is much that can be
learned from the community man-
gers (see www.enewsbuilder.net/techcom
manager/e_article001389770.cfm?x=
bcdTG2,b62fn7vp,w).

• Content management. As the expec-
tations of users rise, we’ll have to up
the ante of what we deliver. The linear
manual format should have been de-
clared obsolete with the publication of
John M. Carroll’s The Nurnberg Fun-
nel (1990); in the coming decade, we’ll
see a sharp decrease in support ma-
terial being delivered in “user guide”
formats. It does require departments
to break down the silo walls with other departments, which I see start-
ing to happen, as shown in the HP
example. I predict that as more com-
panies adopt content management
and become more aware of the value-
added ways in which they can deliver
content, the more creative and useful
the delivery will be.

• No documentation. When I attend
presentations by heads of Web 2.0
start-ups, I inquire about what they do
about documentation, and generally
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Enhancing the *Perceived* Value of Your Technical Communication Department in Hard Times

*By Hannah R. Kirk*
One good thing about the current economic climate is that many people in our society have begun to appreciate and take stock of what they have. If you are like me, you have become more resourceful and able to do more with less—both personally and professionally.

The professional domain is, of course, the topic at hand. Layoffs are happening with frightening force in many industries and some of us are scrambling to become indispensable. Companies are searching for ways to cut back and save money, and we want to ensure that our technical communicators are viewed as assets. While there is no foolproof way to ensure a technical communication department becomes indispensable, all technical communicators can promote their teams and deliverables to increase their perceived value in an organization.

What can we do to demonstrate our value? This article is intended to empower all technical communicators—both managers and individual contributors—to take action and continue this dialogue.

The Value of Technical Communication

Technical communicators bring value to companies by:

- Creating a valuable piece of the end product that reflects positively on that product. Helping customers use the product with ease improves the impression of the product and increases its perceived value.
- Saving the company and customers time and money by providing useful information in one, searchable, user-friendly location.
- Keeping documentation, training, and other deliverables available in one location, even if only on an internal web page. If the information is searchable, that central location can become a resource for internal employees to quickly find information they need to be more efficient at writing code, testing, implementing, or using the product.
- Reducing the workload of other departments. In some single-sourcing and CMS authoring environments, technical communications teams use a single document source that is easily re-used in training materials, e-learning modules, internal implementation guides, and even Software (SQA) test plans. This saves these teams many hours of research and writing time that duplicates the efforts of technical communicators.

I encourage you to brainstorm about other ways in which technical communicators add value. Educating yourself and other technical communicators helps you be more aware of your value and better able to articulate your worth.

Prove Your Value

Now that you know the ways your team benefits the company, how do you prove it? The following small steps can do a lot to help technical communicators self-promote.

All technical communicators have a stake in ensuring their worth to their company, so every contributor plays a part in promoting their team’s assets. Because of the diverse personalities and skills of technical communicators, each person should promote their team in a way that is appropriate for them.

1. Identify Problems That Prevent You from Being Effective

If your team is currently under scrutiny of any kind for underperformance (perceived or otherwise), you must address it immediately. For example, a common problem experienced by technical communicators is late involvement in a product release. Despite the best efforts of managers to obtain information up front, they may repeatedly be informed too late. As a result, technical communicators rush to learn about new features, causing rapid planning which can lead to poor writing. Last-minute reviews burden SMEs, causing slow or low response. Perhaps the documentation is released late. In the end, the deliverables and customers suffer. This reflects poorly on the technical communicators.

Why are technical communicators often involved in the process too late? Perhaps key players are unaware of the value of technical communication deliverables or unaware of the burden on technical communicators when they are involved late in a product release. What is the solution?

2. Gather and Present Supporting Evidence of the Problem and Cause to Stakeholders

In order to resolve any external issues, managers must present information about these issues to those who can help. To do this, managers must be armed with proof of the value of their teams, the problem, the cause, and suggested solutions.

Managers should consistently gather statistics of issues that have been resolved by the documentation. They should collect customer questions that were answered by technical communicators and any positive feedback about the deliverables. If the documentation or other deliverables are available online, web-tracking software can track the number of visitors to the page. These statistics prove the worth of the deliverables and will help a manager build a case for the value of technical communication.

Next, managers should present a solution that minimally impacts others. Technical communicators could attend a product release and a planning meeting. Perhaps a tool exists that would provide information. Managers should find inefficiencies or concerns in other areas of the company and identify ways to reduce these issues by early involvement (for example, alleviating the problem of overburdening SMEs by working with them when they are planning and writing code rather than just before the deadline when they are scrambling to fix bugs).

Finally, identify to whom this information should be presented. Presenting statistics in an understandable, abbreviated format will get your point across as quickly and clearly as possible.
3. Promote Conversation and Creativity

**Conversation**

It is the job of all individual contributors to “advertise” the benefits of their team and deliverables. The best way to do this is in their conversations with other employees. Here is a sample conversation with suggested talking points:

A co-worker asks the following question: “So what exactly does your department do?”

Typical answer: “We write the manuals.”

Self-promoting answer: “We write the manuals that help customers use the documentation. Have you used it?”

If the answer is no, it’s a perfect opportunity to educate them on where they can find the documentation. This is also a good time to jump in with self-promotion. Ask probing questions to allow your colleagues to elaborate on what they liked or didn’t like. When listening, let them know that you value their input. If they did not think the documentation was useful, say something like, “Well, I’m sorry you didn’t find it useful, but we would really like our documentation to be helpful. When you look at it next and find something that is incorrect or unhelpful, can you let me know?” Make sure they understand that you welcome feedback.

If they did think the documentation was helpful, say something like “Great! If you see something that really helped you out, could you let me know? And, if you do find something incorrect or that could be done better, let me know that, too. We always need feedback.” If your technical communication team has a specific method of collecting feedback, direct them to it.

**Creativity**

How do you get people to ask questions in the first place? By drawing attention to yourself. Have fun with it! Pick a day to wear T-shirts that say, “What do I do?” or a clever slogan to get people talking and asking about what you do. This also creates an atmosphere of good humor and approachability. It shows that you care about what you do. It also provides a relaxed atmosphere for people to be honest with you in the future. For example, an SME may feel less threatened when providing feedback.

Other creative promotional ideas include creating a contest or presenting a monthly award to the engineer who gives the most feedback. Send out flyers advertising the location of the documentation. Think like a marketer or promoter and be creative about ways you can get the word out.

4. Enhance Your Feedback Mechanisms

Feedback is one area where every technical communication department struggles. There are three key elements of effective feedback: a tool to collect it; consistent, quality responses; and an effective mechanism to address it.

It is essential that technical communicators receive feedback. There are many methods of collecting it, such as electronic feedback forms on web pages or HTML help files. It doesn’t matter how you collect feedback, as long as it enables customers to respond quickly and easily.

Once you have a method for collecting feedback, you must have people willing to provide it. Ideally, every customer would respond with clear information about what was and was not helpful and why. Since this doesn’t happen, you must solicit feedback. Use your creative promoting skills to let internal and external customers know you want their feedback. Provide a guideline of questions for them to answer when giving feedback, either on your feedback form or in your promotional materials.

The final element, an effective method of responding to and addressing feedback, is equally crucial. Not every person who gives feedback needs a follow-up to thank them and let them know the outcome, but internal customers do. Internal customers who give feedback need to know you are grateful and will respond to their feedback. If you don’t respond positively, they may believe they are not being heard and stop providing it.

An additional bonus of methodically tracking feedback is that managers can track the number of errors in the documentation and how many were resolved by technical communicators. This presents a way to measure the value technical communicators bring. It shows that customers are using the deliverables and that you are making efforts to ensure they are helpful.

There are many more ways technical communicators can increase their perceived value in these hard economic times. We may not be able to change the course of the economy, but at least we can show that technical communicators can be an asset in tough times.

Now that you have some suggestions on how to promote your team, you have no excuses! Start the dialogue, determine what works best for you, brainstorm new ways to promote yourselves, and start promoting! 🎯

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Measuring the Value of Technical Communication in Economic Terms

BY GEORGE SLAUGHTER, Senior Member

How might we measure the value of technical communication in economic terms? The question takes on a greater significance in these uncertain times, but it's difficult to answer for three reasons.

First, technical communication is not seen as a profit center. Technical documentation deliverables usually accompany a product or service, and in such cases are not the products themselves. (In other cases, however, writing and selling a book or podcast, by itself, qualifies because those items are themselves the products.)

Second, the quality of one’s writing is subjective because it is judged through the eyes of the reader. We can all envision a quality technical document: user-focused information written in an accurate, clear, and crisp way, with appropriate graphics to illustrate key concepts and tasks. We have editorial checklists, reference materials, and style guides to help us achieve that vision with our writing. Yet economic metrics, such as how much time and money the information saves the user (or the organization that produces the information), don’t seem to enter the equation.

Third, no standard methodology to measure the value in economic terms has been developed. This is not to say that the topic of measuring value has not been researched. It has, although the most notable articles appeared some years ago and did not focus on economic metrics. For example, Technical Communication has published articles by STC luminaries Janice “Ginny” Redish (see “Adding Value as a Professional Technical Communicator,” February 1995) and Saul Carliner (see “A Process for Evaluating Technical Communication Products and Services,” August 1997, and “A Key Tool for Demonstrating the Value of Technical Communication,” August 1998).

Many business executives understand the importance of technical communication. After all, they must determine how to use technology and tools like everyone else. However, understanding the importance of effective technical communication is different from quantifying its value in economic terms. For technical communicators, discerning that difference and communicating it might go a long way when the budgets get written.

Leaders in the technical communication profession have said that technical communicators must become more assertive in demonstrating the value of their work. (To cite one recent discussion, see “Adapt or Die: Technical Communicators of the 21st Century” in the March 2009 Intercom.) This assertion of value can best be accomplished by quantifying deeds in the profit-and-loss language that executives use.

The Discipline of Market Leaders

To understand how we can measure the value of technical documentation, it might be instructive to first consider how organizations position themselves in the marketplace. In their book The Discipline of Market Leaders (1997), authors Michael Treacy and Fred Wiersema suggest that companies position themselves in one of the following three ways:

1. **Product design and usability testing:** Companies serve customers by providing products or services at minimal risk (for the customer and the company) while earning a profit. Technical communicators correctly focus their efforts on creating information products that present minimal risk for customers. But how can technical communicators also minimize risk and increase profit for the company? Here are some ways.

   1. **Product design and usability testing:** Technical communicators apply non-engineering eyes to their tasks; they can serve as user advocates.

   2. **Product or service support:** The technical communicator knows the product or service and can quickly get an enhanced feel for user concerns that will lead to improved documentation.

   3. **Marketing and sales:** Technical communicators can help sell a product by writing trade articles, product news releases, and sales literature.

   4. **Training:** Technical communicators can help build customer goodwill by training people on how to use the product or service. After all, the technical communicators created the documentation. One can measure value by looking at sales and customer satisfaction.
It has been said that technical communicators tend to be introverted and shy—traits that aren’t necessarily helpful when trying to demonstrate the value of one’s work. By volunteering for these additional roles where economic metrics are more common, technical communicators wear more than one hat. And as sports fans can attest, utility players remain on the roster the longest because they can play more than one position.

Measuring Value in Terms of Consolidation

Expanding the customer base and profit through sales and service is important. Yet many technical communicators not only work behind the scenes but also prefer to be there. What are some covert ways that technical communication can help consolidate costs?

1. Documentation creation: Single-sourcing, with the use of XML and DITA, is one example. Another example involving documentation concerns the use of images. Think of the safety cards found in front of every seat on a commercial aircraft. The images on those cards communicate the required information efficiently (and effectively), and it does not matter what language one speaks. Most instructions have been simplified by using graphics—thereby reducing translation costs and, possibly, printing costs.

2. Documentation delivery: One company I worked for delivered a complete set of printed documentation with its products. Eventually the company decided to deliver only printed installation guides or posters. Everything else—guides, support matrixes, and so on—is now delivered electronically. While I do not know how much money was saved because of that decision, one can assume that the savings were significant.

Exclusive electronic delivery cannot be counted as an end-all solution, though. Another company I worked for manufactures equipment used in a variety of industries, including small welding shops. Many of these users spend their time in the shop, not online, so it was more efficient and more effective to provide a printed user guide.

3. Reduction in support calls and their related costs: This is perhaps the most cited example. One can compare the numbers of support calls before and after a technical documentation deliverable is placed in circulation. For example, a company receives 400 support calls in March and, following the delivery of updated documentation in April, the company then receives 200 support calls a month—a decrease of 50 percent.

One can also take things a step further by estimating the cost of a typical support call and including it in the metrics. Using the preceding example, if a support call costs $50, the company has incurred $20,000 in support costs for March but only $10,000 in support costs for April, following the delivery of the updated documentation.

These examples occur throughout documentation creation, delivery, and feedback processes. Such cases illustrate the value of technical communication in economic terms.

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This article provides a non-technical writer’s perspective of the value of user documentation. As sales and marketing director for Cherryleaf, a technical writing company in the United Kingdom, I want to provide you with some new ideas on how to measure and prove the value of user documentation. We will look at:

- The uncertainty of the benefits of user documentation.
- The business case for documentation.
- What you should measure.
- Adapting user value measurement from the design profession.

The Uncertainty of the Benefits of User Documentation

When technology companies contact us about writing their user documentation, we ask them why they’ve approached us. We ask questions about what problems they want to solve, what benefits they were hoping for, and how they will be measuring the benefits. The responses are usually fairly woolly, to be honest. Most relate to improving the credibility of the product (a feeling that professional products have professional documentation) and reducing the cost of support. Unfortunately, customer loyalty (an area where user assistance can add great value) is something often taken for granted by organizations.

We’ve found documentation managers struggle with the issue of measuring the benefits as well. In a survey we carried out in early 2009, we found that very few documentation managers were clear on the benefits of what they were producing, and very few measured the benefits of their outputs in any meaningful way. For example, they found it hard to say how many users they have and how much content they produce. They struggled to measure how users regard the documentation they produce, yet, they all felt confident they were producing what users needed.

Clearly, there are difficulties in measuring the value of what technical communicators do. In recessionary times, this is a serious problem. As Peter Drucker has said, “customers pay only for what is of use to them and gives them value.” So if the value is not clear, it’s unlikely to be funded.

There will always be a need to explain technical “stuff” to non-technical people. That doesn’t mean there will always be a need for user manuals or for technical writers. Companies may decide to implement new deliverables, and not to involve technical communicators in the process. The challenge for the profession is to deliver the best solution to the problem and to show its value.

The Business Case for Documentation

Arguing for User Documentation in Recessionary Times

Even in a recession, there’s an opportunity to make a strong case for user documentation.

Mike Southon, a serial entrepreneur and a columnist in the Financial Times,
What Should You Measure?

In these challenging times, there is a need to make yourself indispensable to your employers and to focus on providing demonstrable value. In general, documentation adds value through (a) winning or retaining customers (revenue generating benefits of documentation) or (b) reducing costs (such as fewer support calls). However, these can be very hard to measure. This is especially true for customer retention, where user documentation probably offers the greatest value.

From our interviews with UK documentation managers, two measures stood out as great ways to show the value and importance of user documentation. These were: usability testing (and the usability testing of documents) and web analytics. The documentation teams that conducted usability testing or measured web statistics were able to provide more information on the value of the work they produce.

The Importance of Usability Testing

Those who analyzed user behavior through usability testing or customer site visits reported making significant changes to their documentation in light of their findings. This was also true for those analyzing use of web-based content—they were re-writing the content so that it would appear higher in the search engine rankings.

I was meeting with two clients in Cambridge when the conversation turned to the Internet generation and how they search for information. Both clients publish their user documentation on their website, as well as publishing traditional PDFs and online Help files.

The first client said that, according to their recent customer usability studies, the first action for 50 percent of those studied was to go to Google, even when they knew there was F1 online Help available. They said it was essential the Help content was available on the web; otherwise, users would be relying on information outside of the client’s control.

The second client said they’d analyzed the keyword searches on their website and from Google. As a consequence, they were re-writing the Help topic metadata and titles so that they’d appear higher in the rankings. In some cases, they were needing to create content that contained misspellings, which they said went against the grain.

In the past, we’ve suggested that usability testing could be a way of quantifying the monetary value of user documentation. You conduct a test with two groups of potential users. To one group, you give your product to install and use for a period without documentation. To the other group, you give the product with documentation. Once you have done this, you ask each participant: (a) For what price should this product be sold? (b) What monetary value would you place on the documentation? Those who had the documentation should value the product more highly than those who didn’t. The difference between the two prices gives you one indication of the monetary value of documentation. I don’t know if anyone has attempted this yet, and what results it may have produced. I’d be interested in finding out if anyone has.

The Importance of the Internet

It surprises me how few organizations make their user documentation findable through search engines, and how few do any Search Engine Optimization. Putting user documentation onto your website can help improve your company’s search engine rankings. Google favors websites with lots of useful, information-rich content. This means...
Design has shifted focus from giving form to objects and information to enabling user experiences, and from physical and cognitive human factors to the emotional, social, and cultural contexts in which products and communications take place. This shift has been supported by business strategies aiming for sustainable competitive advantage.

Boztepe identified four major categories of user value in design: utility, social significance, emotional, and spiritual values. Typically, the value of user documentation is measured primarily by its utility. Perhaps it should be valued by additional categories as well (see Figure 1).

**Web 2.0 Customer Participation**

Another approach is to measure user participation in Web 2.0-type “User Generated Content.” By this I mean devolving content creation to the users and encouraging collaboration on content creation.

These might:
- Be used as the principle authoring environment for documents.
- Be integrated into a unified documentation set.
- Sit alongside the “official” documentation.

The number of customers involved in participating may indicate the value of documentation, and it could provide you with champions for funding user documentation.

**Adapting User Value Measurements from the Design Profession**

Demonstrating and assessing the value of work is a challenge for other professions as well, such as those in design. Developments in these fields may have relevance to technical communication.

According to Dr. Suzan Boztepe, lecturer in industrial design at Middle East Technical University:

![Figure 1. Potential major categories of user value for user documentation (after Boztepe).](image)

From our survey, those who measured the use of User Assistance on the web reported at least 50 percent more users compared to those who did not have their documents on the web (or who did not measure usage).

**Conclusion**

There’s no doubt that measuring the value of user documentation is difficult; at the same time, there will always be a need to explain technical information to non-technical people.

Although developments in other fields, such as design, may offer new methods for measuring the value of documentation, I feel that, currently, the most effective way is to publish your content on the web and measure its use. Also, measuring its impact on the website’s ranking in the search engines and creating a fan base of customers will also let management know of your value.

**References**


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User assistance can add value to a product or web service’s business model by influencing how extensively users adopt a set of features or services. As more products use pay-as-you-go models, such as SaaS (software as a service), this contribution will become increasingly important.

Users of technology products, from cell-phones to e-commerce websites, often stop learning and adopting features at a level well below the full capabilities of the product. The plateau usually happens when the user has met his minimum
adoption criteria, and the benefit for further adoption doesn’t seem to be worth the extra effort or risk. An example is a bank’s online bill pay service, where it is common to find many users paying bills manually, online, but not using more advanced features, such as receiving bills electronically or making automatic payments. Another example is an e-commerce site where a user might go to buy books but does not buy other types of products offered on the site, such as music or electronic gadgets. In these cases, where adoption curves flatten out at sub-optimized levels, companies miss out on revenue from additional fees or sales. Even in non-consumer-facing applications, sub-optimized adoption levels can lead to economic harm. For example, administrators of a network security system might find the reporting capability of the application to be unsatisfactory because they use canned reports instead of learning to customize them for greater effectiveness. This dissatisfaction could make the security vendor more vulnerable to competitors that boast more useful reports.

Many technology companies think of user adoption as an all-or-nothing, take-it-or-leave-it decision. This article poses an alternative view, one called progressive user adoption. A progressive user adoption strategy consciously moves the user to new levels of product acceptance over time, as well as exposure to the product. In this article, I focus on the role of user assistance to promote progressive adoption.

**Causes of Suboptimal Adoption**

In order to persuade users to extend their adoption of advanced product features, it helps to know why they stop in the first place. Based on observations of users in usability tests, training environments, and at work, my conclusion is that users stop learning for the following two reasons:

- **Users shift from a learning/exploration mode to a task execution mode.** In their initial encounters with a new product, users explore and experiment as part of their learning process. When users learn to meet their initial goals, they stop exploring and experimenting. Instead, they focus on doing the task that initially motivated them to use the application.
- **The benefit/effort ratio gets smaller.** The benefit/effort ratio is less attractive for incremental improvement than for initial adoption. For example, when first confronted with a new phone, users are highly motivated to learn how to make and take calls, and they will struggle until that goal is reached. However, the effort to change ring tones, enter names and numbers in the directory, or learn how to conference in a third party might be more than is deemed worthwhile.

Understanding these root causes is one thing; knowing how to overcome them is another. For that, we need a better understanding of the dynamics of technology adoption.

**Technology Adoption Models**

User adoption of technology products can be explained by two, well-established models: the technology acceptance model (Davis, Bagozzi, and Warshaw, 1989) and the innovation diffusion model (Rogers, 1995).

**Figure 1. Technology acceptance model.**

- **External Variables**
  - Perceived Usefulness
  - Perceived Ease of Use
  - Perceived Security
- **Internal Variables**
  - Attitude Toward Using
  - Behavioral Intention
  - Actual Use

**Technology Acceptance Model**

Figure 1 shows a modified technology acceptance model based on the one Davis et al. originally proposed. The modification is my addition of the box labeled “Perceived Security” to reflect what later researchers have learned about users’ willingness to conduct e-commerce over the Internet (cf. Nilsson, Adams, and Herd, 2005; Salisbury, Pearson, Pearson, and Miller, 2001). It becomes clear in looking at this model that to persuade a user to adopt an additional feature, you must affect the perceived *usefulness* of the feature, its *ease of use*, and the user’s *sense of security* concerning that feature. In the case of progressive user adoption, user assistance can be an effective external variable.

**Innovation Diffusion**

Everett Rogers identified the following attributes of innovations and identified them as having a positive (+) influence on adoption or a negative (-) influence:

- **Relative Advantage** (+) The degree to which an innovation is perceived as better than the idea it supersedes.
- **Compatibility** (+) The degree to which an innovation is perceived as consistent with the existing values,
past experiences, and needs of potential adopters.

• Complexity (+) The degree to which an innovation is perceived as relatively difficult to understand and use.

• Observability (+) The degree to which the results of an innovation are visible to others; how easily it can be described.

• Trialability (+) The degree to which an innovation may be experimented with on a limited basis.

In short, the process for successfully promoting an innovation is:

1. Tell how it is better than what the user is doing now.
2. Demonstrate that it is easy and consistent with what the user already knows or already does.
3. Let the user try it in safe, verifiable increments.

I had an opportunity to see the third point in fast motion, so to speak, while observing a series of focus groups. The focus groups saw two versions of an interface. One was very simple but lacked a robust set of features, and the other offered a robust set of features that market research had indicated users wanted.

The facilitator demonstrated both interfaces, and then asked which interface the members of the group preferred. All the groups selected the simple one, adamantly claiming the other was too busy. But when asked what they would change about the one they selected, they incrementally kept adding functionality that eventually recreated the option they had initially rejected. When shown the rejected option again, they enthusiastically endorsed it. Products that look overwhelming and busy at first can end up being the level of functionality the users eventually want. They just need to get to that level in manageable steps—precisely the strategy of progressive user adoption.

A Coherent Strategy of Progressive Adoption

This section describes a concrete set of steps that can increase user adoption within a product.

First, accept that user adoption is not an event or a single decision on the part of the user. User adoption happens in phases, affecting not only the frequency of product use but also how many features or services a user uses. A progressive user adoption strategy consciously moves the user to new levels of product acceptance over time and within an orchestrated sequence of exposures to the product’s functionality. A well-formulated progressive user adoption strategy does the following:

1. Identifies core functionality.
2. Makes the core functionality bulletproof from a usability perspective.
3. Identifies progressive adoption sequences that go from core functions to advanced functions.
4. Constructs product interventions to move the user to advanced functionality.

**Step One: Identify Core Functionality**

Core functionality is the basic functionality that, if not achieved, will guarantee that the user will reject the product. Understanding this functionality lets you do two things:

- Predict where the initial suboptimal plateau will occur.
- Structure the initial user experience around that core to guarantee success, build trust, and establish a functional base on which to add other features.

**Step Two: Make the Core Functionality Bulletproof**

From a product design perspective, the overriding initial goal should be to optimize the user experience that touches the core functionality. The unspoken corollary here is “Don’t break the core functionality as you move forward.” Promoting or adding advanced features can insert real or perceived complexity, disrupt compatibility with the users’ established routines, and add an increased sense of risk. All three of those effects inhibit adoption.

**Step Three: Identify Progressive Adoption Sequences**

Identify the next layers of features and functionalities that could represent logical steps for the users to take as they gain more experience and increased familiarity with the product.

The following is an example of a revenue-driven strategy implemented by an online bill-pay provider:

1. At initial enrollment, users would typically continue getting their bills in the mail, but pay them manually online. This was the core functionality—if this was not a successful, trustworthy transaction, further adoption could not happen; in fact, the service would be rejected outright.

2. The bill-pay provider would then persuade users to get their bills electronically, but still pay manually online. This feature has important revenue opportunities for the bill-pay provider, allowing it to extend its revenue model by being able to charge billers for the convenience of not providing paper bills. Early attempts to get the users to sign up for electronic billing at initial enrollment were not very successful. The provider found that users needed to first develop trust with the online bill-pay process in general.

3. Users who have authorized routine bills to be received electronically further authorize those bills to be paid automatically online. The adoption of this feature has positive revenue implications for the bill-pay provider, assuring that every bill-pay occurrence for a biller would go through its online service (and thus incur a transaction fee).

**Step Four: Construct Product Interventions to Move the User to the Advanced Functionality**

An important task in this step is to identify moments of opportunity that indicate readiness on the part of the user to advance to a new level of functionality. The complexity in this step can range from simple front-end logic executed on the user interface to complex back-end processing and decision-making engines. For example, in the bill-pay application mentioned earlier, a significant opportunity for automated payments would be if the users were making the same payment to the same biller several months in a row. That pattern could be easily identified from payment history data already being presented on the user interface. On the more complex end, Amazon.com’s sophisticated data processing makes recommendations for the bill-pay provider.
based on the buying patterns of the immediate user and the aggregated patterns of its larger user base.

Interventions can take many forms, from pop-ups to dynamically constructed screens that reflect the appropriate messaging and options for the opportunity at hand. What is of utmost importance is that the intervention not be intrusive on the core functionality. As much as it might go against the grain of the marketing communication member on the product team, it should be easy for the user to ignore the intervention. It should, by all means, be noticeable, just not forced on the users. Users should not be required to change their habitual task flow to reject the option or suggestion. Beware the Clippie effect in which well-intentioned user assistance interventions become aggravators rather than delighters.

Figure 2 shows an example of a website where the user is prompted to adopt an advanced bill-pay feature (electronic bill presentment) through an intervention of a biller information box that appears if the user moves focus into a biller payment area. The message in the Tip section (shown enlarged in Figure 3) and the associated link are dynamically produced based on the selected biller and a set of predefined adoption sequences. The biller information box itself is giving the user information about the biller and past transaction history that increases the user’s confidence and trust in the system as a whole. This increased trust reduces perceived risk in adopting electronic bill presentment. In an actual design similar to this, the intervention was usability-tested to ensure that its presence did not interrupt the habitual bill-pay task flow, which occurs in the left-hand portion of the screen. Progressive user adoption depends on this form of usability regression testing to assure that the user experience with the core functionality does not get disrupted by progressive adoption interventions.

**Conclusion**

A strategy of progressive user adoption lets a company leverage an established user base to increase revenue or solidify competitive advantage without requiring expensive development of new features or costly user-acquisition campaigns. The primary applications for progressive user adoption interventions would be usage-based revenue models, but license-based models are also a target where the increased adoption secures a more loyal customer base.

The overall strategy of progressive user adoption starts with a solid foundation of a satisfying user experience within a product’s core functionality and then builds a logical progression from that base by identifying moments of opportunities and appropriate interventions. Well-crafted, on-screen messages and user assistance are critical components of effective interventions and need to take into account the technology acceptance model and the attributes of innovation diffusion discussed in this article. A key requirement is to not disrupt the core user experience with those interventions.

**References**


Michael Hughes (michaelhughesua@gmail.com) works for IBM Internet Security Systems as a user assistance architect. He has a PhD in instructional technology from the University of Georgia and an MS in technical and professional communication from Southern Polytechnic State University. His professional interest is designing user experiences that accommodate the user as learner.
Returning to the office after lunch a few weeks ago, I was skimming through the various messages posted to Twitter that morning when one in particular caught my eye. What made it stand out was that it wasn’t in the feed I use for my fellow technical publishing colleagues, but in the stream that is dedicated to my friends outside the industry. I had no reason to expect any of them to ever use the word “manual” in their tweets, yet there it was:

OMG! [Company Name] actually charges for their owner’s manuals! That’s absurd.

But is it absurd? At first I couldn’t understand my friend’s reaction. I went to the website that he linked to in his message and, sure enough, the company was asking for $6.99 to download the PDF version of the full owner’s manual for their product.

Now what wasn’t clear was whether this was the price to replace the hard-copy manual that shipped with the product, whether it was a charge for a more detailed manual than a basic quick reference/getting started guide that may have shipped with the product, or whether this was the only way you could get any information on the product. A little more research suggested that it was most likely the middle scenario, i.e., the product shipped with some basic documentation and the extra material was available for a price. But my friend’s reaction stuck with me for the rest of the afternoon. I started to wonder, is that the common expectation, that all the manuals associated with a product should be “free”? If so, why? If we, as an industry, have laid the foundation for this assumption, have we done ourselves any favors?

Over the years I have, at different times, worked with two companies that have almost identical competing product lines. In general, they each have around 50 percent of their given market (although actual market leadership...
tools of the trade

...tends to fluctuate between them on a year-to-year basis). Yet they have two diametrically opposed philosophies when it comes to supplying documentation.

Company A has the philosophy that when you buy their product you get everything included to run, maintain, and operate it (but not to repair it), so they include the cost of producing the documentation in their product pricing. They make their money on spare parts.

Company B has the philosophy that when you buy their product, you only buy the product and then pay extra for the bits and services you need, as you need them, so they have a lower product price and charge for their documentation (and their spares, too).

The total cost of ownership for both products over the normal operating span turns out to be just about the same. So which is the right approach? Is there even such a thing as the “right” approach? Let’s take a look at the two scenarios in more detail.

COMPANY A—
Documentation Included

This is perhaps considered the more traditional model. A content development team writes the various manuals, help sets, etc., and publishes a complete suite of documentation. The whole suite, which can range from one small manual to literally hundreds of large volumes (for example, in the case of an aircraft), is then delivered with the product. The cost of producing those manuals is covered in the product cost, and the customer perceives them as being “free.”

This may seem to be the best approach. However, it can have negative impacts in terms of both the quality of documentation and in the way that the documentation is perceived. I’ve been amazed at the number of companies that don’t consider the cost of the documentation. They don’t calculate it, they don’t consider it a development cost, and they don’t cover it in the price of their products. Often companies consider documentation to be “a necessary evil” (a phrase I have heard more than once) and an uncontrolled overhead. As a result, the content development is not considered an integral part of the design and production process and is poorly funded (if at all). The result is usually poor quality documentation.

As a general rule of thumb, if you buy a low commodity-priced product and it includes “everything,” then there is a fair chance that the manuals will be next to useless (this is a broad-stroke statement, and there are always exceptions to it). If the cost of documentation has been taken into account and is covered in the product cost, it is usually calculated as a fixed percentage, which means the documentation team has a fixed budget within which to operate. With a fixed budget, there is rarely any room for dealing with new market demands or changes to the product, let alone innovation or being seen as an active contributor to the company’s bottom line. With this approach, the documentation team is also tasked with doing “everything” and having to learn about, and document, every aspect of a product’s operation, often before the design is even finalized, but certainly before the product ships. The result can be rushed and incomplete documentation as the team creating the manual has to work around inevitable knowledge gaps, design changes, and compressing deadlines.

COMPANY B—
Documentation Sold Separately

In this scenario, the cost of producing and distributing the product documentation is usually well understood and managed. Most products will ship with a small, “free” documentation set that covers the basics of getting started and simple operation, with the expectation that if customers want to know more, they will have to spend money. A good example of this would be the books that are included in your car’s glove box—most people who want to maintain and repair their cars will go and buy a book on how to do it. There are whole companies who write and sell specialist manuals for car dealers, repair shops, and enthusiasts. The vast major-
ity of customers will never have a need for the full documentation suite and probably only access a small percentage of it, so why provide it to everyone? The manufacturer can focus on producing the documentation for 80 percent of what its customers need, and the other 20 percent can be covered by a recognizable revenue stream from selling the specialist manuals.

This sort of scenario also makes it easier to support both traditional and agile product development models. Rather than trying to produce all-encompassing documentation that will inevitably include some material that never gets referred to, instead the documentation team can focus on the most immediate customer need—the answer to the question, “How do I do ___?”

For instance, my wife recently bought some new software for her iMac. The documentation that came with it consisted of exactly two pages outlining five procedural steps on how to best install the software. That was all she needed to begin using the application within five minutes of opening the box.

So back to my friend and his complaint: When I spoke to him later that evening, I asked him how he had found out about the charge for the manual in the first place. What he described raises a few other points that we as an industry need to consider—the changes in user behavior. The piece of equipment my friend had been using stopped functioning, he knew he had the box somewhere that possibly still held the instructions, but rather than go look for it, he did the first thing that most people do these days. He opened a web browser and found the manufacturer’s website using a search engine. I’ll admit this is a category I also fall into, as I suspect most people do. I have a neat stack of owner manuals on a shelf in my garage for almost every piece of equipment and appliance in the house, but the only time I look at them is to find examples to use for presentations, blog entries, or articles such as this one. If I need to find out how to fix something, I go online. The search engine has become the new help set, and the webpage has become the new manual. Given this scenario, making the manual available at the time that people need it seems to make sense. And if the customer base is willing to pay for that privilege, it could also make a few cents.

Where current “pay as you need it” models break down is that most online manuals you pay for (including the one that my friend was complaining about) are PDFs of traditional print books. You still end up buying the complete book even if you only want one or two sections of it. If you have a pay-to-download model, why not publish the information using a topic-based architecture (such as DITA), rather than the traditional book paradigm. Instead of asking customers to pay for the whole book, why not embrace the iTunes model of micro payments and charge $0.99 a topic? This way you can easily track which are the most accessed topics and, maybe just as important, those that no one ever looks at. You can then focus attention on the areas that have the most value to your customers.

**So Which Is the Right Approach, Free or Paid?**

I think they both can be. Whether or not you charge for documentation is determined by many factors such as the business plan, the content development team’s role in your organization, customer expectations, etc. But the cost of documentation development should be correctly calculated and factored into the product development costs. You need to recoup those costs somewhere—it just becomes a matter of deciding where in the product life cycle and how.

If I had to favor one method, I’d say go the separate charge route. This approach allows more flexibility for delivery, it gives the customer choices, it lowers product prices, and it turns the content development team from being an overhead into a profit center.

On a personal note, when I switched one documentation department from an overhead to a revenue generator, it completely changed the way the documentation, and the people who produced it, was perceived. Budgets were increased, innovation was encouraged, and members of the team were given the opportunity to apply their skills across the organization. As one member of that team recently said in an email, “Technical Publications never looked back.”

And the customers liked it, too.

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Alan J. Porter (alan@alanjporter.com) is president and founder of 4J’s Group. Alan has 20-plus years experience in Corporate Communications in the UK and USA. He has been involved in the development and adoption of various industry publishing standards and has been a regular speaker at industry conferences. He has held senior management positions at various software and services companies, allied with extensive consulting experience. Alan is a regular speaker, blogger, and twitter addict who is happy to talk communications to anyone who will listen. He has authored several books, comics, and numerous magazine articles. He is also a member of the management team of The Quadralay Corporation (WebWorks.com).
Technical writers are a commodity—providing a service to be acquired at the lowest possible price given an acceptable level of quality.

OK, maybe we’re not a commodity. But we’re often perceived as a commodity, which is just as bad.

In part 2 of this series on taking control of your career, I mentioned that one strategy for staying employed is to make yourself so valuable to your company that they wouldn’t even consider letting you go. This article expands on that concept, giving examples of what I and other STC members have done, and I hope it will inspire you to find your own unique ways of adding value to your company.
It’s the Economy, Stupid!

In 1992, Bill Clinton ran for president with the slogan, “It’s the Economy, Stupid!” which meant that no matter what else is going on in the country or in the world, people first need to believe they will have a job in order to put roofs over their heads and food on their tables.

I can think of no other phrase that better summarizes the challenges we face in keeping our jobs during this time of economic uncertainty. Instead of “the economy,” we can substitute “the company’s bottom line,” because no matter what else you do in your company, if you are not directly adding to the company’s bottom line and are perceived by management to do so, you are prime fodder for the next round of corporate downsizing.

Focus on What Matters

Let’s face it, management doesn’t care if the manuals you create are filled with misplaced modifiers, split infinitives, or two spaces after a period. What management does care about is the user experience. Is the customer happy with the product? Can they use it? Will they continue to buy from the company and generate ongoing revenue, or will they return your product and buy one from a competitor? In a white paper entitled, “What Do Your Manuals Say About Your Company?” (www.manuallabour.com), STC Associate Fellow Bonni Graham writes:

According to the Consumer Electronics Association, product returns represent a $10 billion-dollar-a-year problem for the consumer electronics industry. Technical support costs are spiraling (even with the migration to off-shore providers) while consumer satisfaction with this support is plummeting. New technology and expanded offerings to a stabilized market are increasing competition. What can manufacturers do to help combat these problems? Better consumer manuals are a start.

Here are two experiences that illustrate this concept: a few years ago, a friend received a breadmaker as a Christmas present. She was looking forward to having her family wake up to the smell of fresh-baked bread, but it never happened. The manual that came with the breadmaker was so poorly written and the user interface so cryptic that she took it back to the store for a refund. When she arrived, there were several other returned breadmakers (the same model) on the shelf behind the desk. The company skimped on the technical writing budget—what did that cost them in lost revenue?

Soon after my friend’s experience with bad documentation, I had my own. I owned a Hughes digital video recorder, which I absolutely loved, from DirecTV, but I had to switch to a new brand when I upgraded to high-definition TV. The user interface on the new DVR was not intuitive, the manual was badly written, and the index was practically worthless. As a result, I had to call tech support three times to ask how to do the most basic actions—actions that were clearly documented in my previous DVR’s user manual. (I actually read the user manual and tried to find what I was looking for before giving up and calling the support number. How many people called without even looking in the manual, or just gave up and returned the product? These problems cost companies money.)

Were these experiences caused by bad writing or bad budgeting (not paying for a professional technical writer)? Probably both. Regardless, the writers who wrote the manuals could have used whatever time and resources they did have to make the user experience better, and they could have avoided unnecessary returns and expensive tech support calls.

I’ve just described two negative experiences with user documentation that cost companies money. Let’s turn now to two positive experiences, where writers saved their companies money or, better yet, generated more revenue.

Back in the days when there were only two main help authoring tools online (Doc-To-Help and RoboHELP), a writer asked me if I could recommend a good class to learn RoboHELP. I replied, “No need to start with a class. Just download a free trial of the tool and do the online tutorial—it’s quite good.” In fact, I gave that advice to several people. Because there were only two dominant authoring tools at the time, chances were pretty good that the writers who tried the RoboHELP online tutorial bought the product after seeing how easy it was to learn. I don’t know how much revenue the technical writer who wrote those tutorials generated, but I bet it was significant! (Note: This is the exact type of information you should be capturing and presenting in your résumé, your annual review, etc. Are you helping to generate revenue for your company? If so, find out how much!)

Another example involves a leading manufacturer of color printers for the home consumer with a multi-feature unit that included a printer, scanner, and fax machine. Unfortunately, the product was hard to assemble and configure, and the existing user manual was little help. I forget the exact metric they quoted when they brought us in to help, but it was something like this: for other printers in their product line, they were receiving 1 support call for every 100 units sold. For this product, they were receiving 106 support calls for every 100 units sold! The company did what they could to simplify the installation process and hire my company to totally rewrite the quick-start guide, replacing the old multi-page quick-start guide with a simple illustrated box-top.

The result? Tech support calls decreased by 96 percent in the first six weeks after they released the new product. We had a direct result on the company’s bottom line, and you better believe I quote that statistic every time I meet a potential new client! (By the way, the company is still using our box-top design years later—who knows how much money we saved the company?)

Have you done anything to help reduce tech support calls in your company? Have you found ways to save on development time or production costs? If so, get the word out! If not, start looking for ways to do so!

Increase Your Sphere of Influence

The previous anecdotes are examples of what you can do as part of your day-to-day job to increase your corporate value—proactive, causative steps you can take to increase revenue or decrease costs. Now let’s look at examples of actions you can take outside of your day-
to-day job responsibilities to increase your sphere of influence.

A few years ago, Invitrogen Corporation needed to redesign its website to lead potential customers through a very complex decision tree to identify the exact product they needed. Rather than hire a business analyst or a website production company to do the work, Invitrogen Documentation Manager Kris Oden and Manual Labour’s Bonni Graham rolled up their sleeves to tackle the problem. By approaching the problem from the customer’s viewpoint, they were able to walk through the decision-making process and design a decision tree-based user interface that made the selection process faster and easier for the customer, which resulted in greater sales after it went live.

Bonni explained, “I teach a class on Critical Thinking Skills for Technical Communicators as part of a certificate program at the University of California, San Diego and this project was an excellent example of what I cover in the course. By analyzing the audience, their needs, the process, the logic, we were able to design a user interface that made it easy for customers to find what they needed. Was this a typical job for a technical communicator? No—but someday it will be!”

I asked members of the STC Management SIG how they added value to their companies. Here are just a few of the many responses I received:

“At one company where I worked we had a large number of employees for whom English was a second language. All employees had to write self-evaluations as part of the annual review process, so our tech pubs department offered to help people write them. We said, ‘We can’t tell you what to say, but we can help you say it.’ The goodwill we generated was far greater than the amount of time it took.”

Philip Sharman

“I created a corporate communications position with my previous employers. I continuously sought out opportunities to show that I had a skill that could fill a void within the company. In my time there, I took over as project manager for the corporate newsletter and annual report on research, I edited all web content, edited and wrote marketing and technical materials, created a corporate style guide, developed training sessions for all levels of employees, and met with new hires to discuss the importance of intelligent communication.” Danica Rhoades, Write Rhetoric

“At Pearson, in our proposal group, we were worried about the lower number of RFPs coming in and the downtime looming, so we marketed ourselves to other Pearson companies to develop proposals, oral presentations, white papers, marketing materials, etc. It has worked well. We started working for one company (at the time called Pearson Educational Measurement), and now we do work for six companies (with another in negotiations right now). Consequently, we have grown our reputation and our staff. And it has been a wonderful opportunity.” Diane Borgwardt

“In 2004 my team volunteered to help with the voluminous documentation required for our first Sarbanes-Oxley filing. We made standard templates in Word and Visio that provided consistent formats for auditors to review. Several people on my team had good Visio skills and assisted subject matter experts who couldn’t produce their own Visio diagrams. This work kept three of my team members fully employed during a period when others in our department were being laid off.

We also broadened our scope by taking on training for proprietary or purchased software used by the company. In many cases we’d been engaged to write the user manual or quick reference, so we had to learn the software ourselves and consider how the employees would use it to do their jobs. So it was a short hop to delivering training. Not all tech writers are comfortable training, but I was lucky to have several who wanted to expand their careers in that direction. So it was win-win.

These kinds of opportunities exist, if you just take the time to look for them. It requires informal networking within the company, not being afraid to toot your own horn, and maybe working late once in a while to demonstrate your commitment. I enjoy it because it keeps my job from getting stale.” Holly Harkness, Mirant Corporation

Jean Femia at Opto 22 offered this great summary:

“My company is unusually open, and we have greater opportunities due to our flat reporting structure. But the point is, if you offer to do things—with the motive of contributing, not supplanting—and you do them well, you can definitely increase your value in the company.”

Moving Forward

What do all of these stories have in common? Each person saw or searched out a need, proactively informed the parties involved that they could fill that need, and then proceeded to do so, which significantly raised their sphere of influence (thus raising both their corporate value and their recognition that they added value).

In part 2 of this series, I showed that there are nearly limitless directions in which you can take your career over the long-term. The examples in this article show that no matter how specifically or broadly defined your job duties may be, there are nearly limitless actions you can take right now to increase your sphere of influence and your job security.

How big a sphere of influence do you want?
2008–2009 Community Award Winners

During STC’s 56th Annual Conference in May, the winners of the Community Achievement Awards were announced. These awards honor STC chapters and special interest groups (SIGs) that have distinguished themselves through exceptional accomplishments in fulfilling the goals of STC.

To earn awards of Merit or Excellence, communities—including student chapters—complete key activities and apply to the Community Achievement Awards Evaluation Committee (CAAEC) for recognition. A community that earns an Excellence award may also apply for recognition as a Chapter or SIG of Distinction. After reviewing applications and nominations from the CAAEC, the STC Board of Directors selects the Communities of Distinction. (Only one Community of Distinction is selected for each of the size categories established at the beginning of the fiscal year.) The 2008–2009 Community Achievement Award recipients are listed below.

**Communities of Distinction**
- Chapters with 301 to 600 members
  - Washington, DC Chapter
  - Chicago Chapter
- Chapters with 151 to 300 members
  - Carolinas Chapter
- Chapters with 76 to 150 members
  - Northeast Ohio Chapter
- Student chapters with more than 20 members
  - North Carolina State University Chapter
- SIGs with 1,500 or more members
  - Technical Editing SIG

**Communities of Excellence**
- Atlanta Chapter
- Boston Chapter
- Carolina Chapter
- France Chapter
- Houston Chapter
- India Chapter
- Lone Star Chapter
- Orlando Chapter
- Orange County Chapter
- Rocky Mountain Chapter
- South Carolina Midlands Chapter
- James Madison University Chapter
- Instructional Design and Learning SIG
- Usability and User Experience SIG

**Community Pacesetter Awards**
The Community Pacesetter Awards recognize STC communities for highly innovative and successful activities. The winners for the 2008–2009 year are:
- Canada West Coast Chapter
- Cedarville University Chapter
- James Madison University Chapter
- Northeast Ohio Chapter
- Tokyo Chapter

For more information about the Community Achievement Awards program, download the guidelines from the STC website at [www.stc.org/stcmembers/admin Docs01.asp](http://www.stc.org/stcmembers/admin Docs01.asp).

Congratulations to this year’s recipients!

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**Mercer’s Online Master of Science in Technical Communication Management**

Mercer’s MSTCO program provided me with practical working knowledge of the latest developments in the field.... The management aspect of the curriculum was enlightening.... If you are a leader in this field or hope to be one some day, this program is for you.

Christine Granger
2006 Graduate
User Education Manager
Professional Datasolutions, Inc.
Temple, Texas

Students may begin the program in August, January, or May.

www.mercer.edu/mstco
STC Awards

The Society for Technical Communication recognizes individual member achievement through several award programs.

Jay R. Gould Award for Excellence in Teaching Technical Communication
The Jay R. Gould award honors the distinguished teaching career of Professor Gould and celebrates true academic mentorship, demonstrated by the personal and professional concern that great teachers extend to their students beyond the classroom.

The Gould award nominating committee is seeking nominees for the 2010 award. To be eligible, a nominee must have been a member of STC for at least ten years and must have been involved in postsecondary education for at least fifteen years. Current STC board members and members of the Gould award nominating committee are not eligible.

For further information and recommendation forms, refer to Guidelines for the Jay R. Gould Award for Excellence in Teaching Technical Communication on the STC website at www.stc.org/recog/awards01_JRGould.asp. Nominations are due by 2 November 2010.

Ken Rainey Award for Excellence in Research
The Ken Rainey Award honors the distinguished research contributions of Dr. Rainey, a professor at Southern Polytechnic State University and an STC Fellow who produced major research studies that continue to provide ongoing benefit to both practice and teaching in the field of technical communication.

This award honors research that has made positive, significant contributions to technical communication practice and teaching. One award will be given each year to an STC member who has made a positive difference to practice or teaching in the field of technical communication from conducting a lifetime of quality research in the field or from completing a single high-quality empirical study or a set of related high-quality studies.

To be eligible for the award, a nominee must have been a member of the Society for Technical Communication for at least one year. Nominations are due by 2 November 2010. For more information, see www.stc.org/recog/awards01_kenRainey.asp.

Frank R. Smith Outstanding Journal Article Award
STC established the Frank R. Smith award to encourage authors to publish high-quality articles in our scholarly journal, Technical Communication. The award honors the memory of Frank Smith, during whose eighteen-year tenure as editor, Technical Communication became established as the flagship publication of STC and the profession. All authors published in the calendar year’s issues of Technical Communication are automatically entered to be judged for the award.

The editor of Technical Communication appoints a judging committee that includes one Society Fellow, one academician, and one industry representative. This committee selects the winning article from the previous year’s journal issues.

One Outstanding Article award may be given each year. One or more Distinguished Technical Communication awards may also be given to recognize the merits of other top contenders in the competition.

For more information about the Frank R. Smith award, visit www.stc.org/recog/awards01_FRSmith.asp.

Plan Now to Exhibit at the 2010 Summit

Planning is already underway for STC’s 2010 Summit Expo! Companies interested in exhibiting at the Annual Conference next year should contact Stacey O’Donnell, membership development manager, at +1 (571) 366-1915 or stacey.odonnell@stc.org. STC’s 57th Technical Communication Summit will be held 2–5 May 2010 in Dallas, Texas.
A value proposition for technical communication (or anything else, for that matter) has to show how it is strategically essential for the survival and growth of a business. Anything that is not strategically essential to a business can be reduced, marginalized, farmed out to the lowest bidder (as opposed to a trusted, valuable outsource), or otherwise removed from the asset side of the corporate balance sheet, with relatively little impact on operations and outcomes. Depending on the company’s core business and culture, such functions as development, manufacturing, sales, marketing, and accounting/ internal auditing can all be considered strategically essential—or not.

To be considered strategically essential, functions must align themselves with and show how they contribute toward meeting the goals of the business. Thus, a value proposition for technical communication needs to answer this question: How does technical communication reduce a company’s costs, increase its profits, solve its problems, and reduce its risks?

Developing a Value Proposition for Technical Communication

BY THEA TEICH, Guest Columnist and Fellow

Are you self-employed? Would you like to be? This column explores the joys and challenges of managing your own business in technical communication. Please share your experience and ideas. Contact Bette Frick at efrick@textdoctor.com.

Elizabeth G. Frick, Column Editor

Is this really that tall an order? Based on my experience, plus some research sponsored by STC and others, the answer is no.

Note in the above paragraphs that I did not say “the value proposition for technical communication,” but rather “a value proposition.” That’s because there are many value propositions for tech comm, depending on the industry to which it’s being applied and the aspects of tech comm that are most relevant to that industry. Indeed, it may be necessary to tailor the value proposition for individual companies and even alter it further depending on the current value of the Dow Jones Industrial Average. What tech comm value would you emphasize today if you were dealing with a financial services firm? A healthcare agency? A company that thinks it just developed the latest “killer app”? The common factors relating to any tech comm value proposition include knowledge, awareness, and understanding of audience, but the value propositions that will work for your business, each of your clients, and/or your employer will require tailoring beyond this basic foundation—but more on that later.

Let’s go about developing a foundation for a value proposition for technical communication in a stepwise fashion—a procedure dear to the hearts of technical communicators—starting with the 30,000-foot view and working our way down to where we are hovering over that table to which we bring our value. We are all comfortable with breaking down tasks into pieces that are easily described, understood, and handleable. Let’s use that process here.

**Step 1: The View from 30,000 Feet**

A very useful place to start is the description of technical communication that STC has proposed to the US Bureau of Labor Statistics to replace the terribly outdated, inaccurate, and, some might say, derogatory one that is currently used. The proposed description reads:

Professionals who transform and manage information by developing and designing instructional and informational tools needed to ensure safe, appropriate, and effective use of science and technology, intellectual property, and manufactured products and services.

Some important points can be derived from this description in crafting a value proposition:

- Technical communication has a direct and beneficial effect on people, i.e., its value can be seen and quantified by how people work better, solve more problems, use equipment and technology more efficiently and safely, etc.

- Technical communication is intertwined with information design and dissemination—both foundations of today’s industrial economies, i.e., the Information Age.

**Step 2: Reducing Altitude to 10,000 Feet**

Marketing consultant Michael L. Perla, in an online Marketing Profs article published 1 July 2003 (www.marketingprofs.com/3/perla8.asp?sp=1), said:

As any good negotiator or sales person will do, the essence of the value identification process is to perform a thorough needs analysis with the value proposition targets, be they employees, partners, or customers.

The needs analysis should cull out the value parameters (e.g., timing, magnitude, risk) and the current and anticipated pains and challenges of the individual or group. If your value proposition is analogous to a typical sales campaign, then you need to diagnose the different pains of your targets and understand which one hurts the most, and where they can get the “biggest bang for the buck.” Additionally, you need to understand the risks or side effects of your solution so you can
either prevent or mitigate them, and develop, as necessary, the risk-adjusted value proposition.

So, here we are back to audience analysis again. The value proposition is dependent on the audience that you are approaching. As Perla says, “you need to diagnose the different pains of your targets.” So, in coming down from 30,000 to 10,000 feet, we have moved from the broad, overarching concepts of our value proposition (professionalism, benefits to people, a requirement for success in the Information Age) to analyzing the needs of our audience(s) as they relate to what technical communicators bring to the table, i.e., how tech comm meets those needs.

I’d like to share a few of the value propositions (or “elevator messages”) that some of my colleagues and I have developed. We’ve used these in presentations, individual websites, and wherever else they’ve proved useful in explaining the value of technical communication.

These value propositions take the broad concepts from the 30,000-foot view discussed earlier and give them an action orientation. They are somewhat low on detail, which allows them to work well with many audiences. In other words, we’ve analyzed the “pains” of our prospective employers and clients and come up with basic value propositions. At this point, the value proposition’s role is to pique interest so that you will have the opportunity to express more in greater detail. From this point, specific advantages and capabilities can be discussed—that is, the values that make technical communication strategically essential for a specific business.

- Technical communication means managing data that has been stored, scribbled, or saved; crafting messages that get through to specific audiences; and keeping readers awake and engaged as they take in information they can use.
- Technical communicators make complicated things easier to understand.
- Technical communication enables people to get the most from the technology in their lives.

### Step 3: Hovering and Coming in for a Landing (Smoothly, We Hope!)

At this point, we are ready to consider the specific ways that technical communication is strategically essential to an organization—how it lowers costs, increases profits, solves problems, and/or reduces risk. Which of these business goals is most important to your immediate audience determines what advantages of technical communication to emphasize. Some examples or possibilities follow.

Costs and risks are reduced from the benefits of plain language. As Joseph Kimble of Michigan State University’s Thomas M. Cooley Law School says in his now 10-year-old article, “Writing for Dollars, Writing to Please” (www.plainlanguagenetwork.org/kimble/):

[T]ry to imagine the costs of poor writing—typified by officialese and legalese—in business, government, and law. The costs are almost beyond imagining, and certainly beyond calculating.

If this evidence doesn’t convince organizations and individual writers that plain language can change their fortunes, probably nothing will.

Profits increased and problems solved by clear communication. According to Joseph Kimble:

[P]lain language is not just about vocabulary. It involves all the techniques for clear communication—planning the document, designing it, organizing it, writing clear sentences, using plain words, and testing the document whenever possible on typical readers.

Some other points that might be included in this (relatively) detailed value proposition include profits increased, problems solved, and risks reduced by helping people find their way to your message amid all the information they are bombarded with. Louise Tincher, current Southwestern Ohio Chapter president, in a presentation to the YWCA of Hamilton, Ohio, in March 2009, said:

As life gets increasingly complex, we are inundated with information. We need help making sense of it. Good technical communication is not flashy, showy, or obvious—it just works. The end products of skilled technical communicators are easy to understand—whether they are design documents, user guides, training manuals or marketing materials. Technical communicators can help with any situation where people need to deal with large amounts of information, new or complex ideas, or new technology.

To paraphrase the theme song from Cheers (a television program long gone from the airwaves, unfortunately), making your way in the world today takes everything you’ve got, and technical communication makes this a whole lot less painful. In other words, technical communication makes it easier for a business’s customers, employees, vendors, stockholders, and other stakeholders to make their way through the inundation of information we all experience to find and understand the information they need because it is presented in a planned, designed, and organized way that enables them to get work done.

Now, I think that’s a value proposition if I ever saw one!

Many thanks to Judy Harper, Sylvia A. Miller, and Louise Tincher of the STC Southwestern Ohio Chapter.

For more than 30 years, Thea Teich (TeichTMC@aol.com) has worked in the fields of technical and marketing communications for major industries, government agencies, and nonprofit educational and research institutions. In 1995, she started Teich Technical and Marketing Communications, which offers technical and marketing communications services, including web content development, indexing, report development, editing, writing, and marketing communications consultation to clients ranging from software manufacturers to financial services, from technical publishing to marketing research. Thea Teich was the 2003–2004 STC President and served on the Board of Directors between 1998 and 2005.
This column discusses new technologies that may affect technical communicators in the near future. If you have feedback or want to suggest topics for subsequent columns, please contact Neil Perlin at nperlin@concentric.net.

WinHelp Is the New COBOL

BY NEIL E. PERLIN, Associate Fellow

Given its theme—the bleeding edge and beyond—this column seldom looks backward. But there are topics for which it's important to look backward in order to move forward. The fate of Windows Help is one of those topics.

In the 1990s and early 2000s, Microsoft's Windows Help, or WinHelp, dominated online help authoring. When it was introduced in the late 1980s, WinHelp soon overwhelmed third-party online authoring tools then on the market, which is why few help authors today have ever heard of Black Magic, Folio Views, Lotus SmarText, OWL Guide, or others.

WinHelp had many strengths. It was a Microsoft standard, which carries a lot of weight by itself. It was native to Windows, so online help authors didn't have to worry about how their readers' PCs were configured. (If they ran Windows, they were configured.) And it was free, unlike the third-party tools.

Despite its strengths, WinHelp fell victim to a change that was as much strategic as it was technical—Microsoft's shift toward HTML in the mid-1990s. One result of this shift was that Microsoft re-wrote what would have been a new version of RTF-based WinHelp for HTML and introduced it as HTML Help to a stunned audience at the WinWriters (now WritersUA) conference in February 1997. After that, WinHelp was dead. But despite being dead, WinHelp lived on, like COBOL (COmmom Business-Oriented Language), because it was so entrenched. There were various reasons for this, including:

- Many companies that had built large help systems or online guides simply thought that WinHelp met their needs.
- Other companies saw the benefit of moving to HTML Help but were put off by the uncertainties of the HTML Help environment. (The Justice Department suit against Microsoft in the late 1990s made it difficult for help authors to know if prospective readers had any browser, let alone IE, which had to be on the readers' PCs in order for them to run HTML Help.)
- Other companies just didn't want to go through the effort of converting to HTML Help, even if they could do so using a variant of their WinHelp authoring tools, such as converting a WinHelp help system created using RoboHelp for Word to HTML Help using RoboHelp HTML.
- Some companies today are still sufficiently entrenched in WinHelp to be using dead tools, such as ForeHelp, or niche tools, such as XDK, even though the support for such tools is getting thinner with every passing year.

Today, however, the browser uncertainties are history and other technology-, tool-, and market-based forces are starting to come to a head. The result is that it's time to leave WinHelp. Here are five reasons why:

1. It's dead. Theoretically, this is irrelevant as long as you can still use an authoring tool to create WinHelp that meets your needs. However, once a technology dies, it may live on, but there's a slow-but-steady erosion of the "ecology" surrounding it. Contractors and consultants who know the technology and its tools get harder to find, and technical support and bug fixes start to slip as the vendors move into new areas. (A support rep from one vendor that still supports WinHelp told me that they had no information about WinHelp in their knowledge base!) Basically, your development flexibility begins to erode.
2. It looks old-fashioned. WinHelp’s bland, grey interface looks old and uninviting in today’s web-based world.

3. It’s not web-capable. The Internet existed when Microsoft created WinHelp, but the web barely did, so there was little reason for Microsoft to make WinHelp web-capable. The result is that you can use the web to distribute the HLP and CNT files that form a WinHelp project, but can’t run the WinHelp from the web.

4. Its macros may be a security risk. WinHelp is based on RTF, so you can create it using any tool that can output RTF. But the easiest way to create it was to do the coding using Word. (The first help authoring tools like Doc-To-Help and RoboHelp were basically Word plug-ins.) These tools used macros extensively, and WinHelp itself supported a large number of macros. Today, however, macros are viewed as security risks because of their potential for carrying viruses.

5. Authoring tools are vanishing. Many old tools, like ForeHelp and Help Magician, no longer exist. Others, like RoboHelp for Word, still exist but may not have had major upgrades for a long time. This can lead to strange problems, like RoboHelp HTML being unable to read some codes in WinHelp projects created in RoboHelp for Word. Finally, with the newest tool, Flare, MadCap made a strategic decision to abandon support for older formats like JavaHelp, Oracle Help, and WinHelp entirely. So if you want to move a WinHelp project to Flare, you first have to convert the project to HTML Help using another tool, then import the converted project into Flare. This works, but the process can be cumbersome and any cross-format conversion is a potential source for errors.

Summary
Technologies sometimes seem to live forever. (In the early 2000s, I was asked to submit a proposal to create online help for an application that ran on the Apple 2C) Even though we rarely see a sharp dividing line between past and future technologies, WinHelp is one such dividing line. This once-bleeding edge format is increasingly unable to deal with the new and powerful technologies that are now available or in the wings for online documentation. It’s time to leave it behind.

Errata
In my article on using help authoring tools to create DITA (March 2009), I suggested that RoboHelp was the first to support DITA. It didn’t actually support DITA specifically, but rather offered a generic XML feature in X5 that allowed authors to import and export material to or from XHTML, DocBook, and other XML-based formats that the author could define, one of which could be DITA. X5 was released in late 2003 or so. (Note the date in this article: www.actionscript.org/resources/articles/352/1/Macromedia-announces-RoboHelp-X5/Page1.html.)

Bill Swallow pointed out that WebWorks’ ePublisher supported DITA since v.9.3, which dates back to September 2007, and that Author-IT could create DITA output from v. 4.5, which dates back to August 2005. Based on these dates, I’d still argue that RoboHelp X5 was the first help authoring tool to offer DITA support, albeit not specifically and as part of a larger XML feature, but Bill is right in that other tools pre-date RoboHelp in offering DITA support specifically. Thanks to Bill for catching this discrepancy.

STC Takes APEX Awards by Storm

STC and its communities won eight awards for publications excellence in the APEX 2009 competition.

More than 3,700 entries in 11 major categories were submitted. STC Fellow Cynthia Lockley, Washington DC Chapter, received a Grand Award in the major category of Web and Intranet Sites for her work on the chapter’s website (www.stcwdc.org). She is also the webmaster for the AccessAbility SIG, which won an Award of Excellence for its website.

“Cynthia has long been a strong supporter of accessibility and her brilliant attention to detail has been very productive for the chapter. We are lucky to have her as our web diva and mentor,” said Carolyn Kelley Klinger, member of the DC Chapter leadership team.

APEX Awards are based on excellence in graphic design, editorial content, and the ability to achieve overall communications excellence.

Awards of Excellence recognized exceptional entries in the following sub-categories:

• Newsletters—Print
  Tom Lunde, Chicago Chapter
• Newsletters—Web and Electronic
  Carolina Chapter
• Newsletters—and Electronic
  Jackie Damrau, Dallas Chapter
• Magazines and Journals—Over 32 pages
  Elizabeth Pohland, STC’s Intercom
• Blogs, Forums, and Wikis
  AccessAbility SIG
• Web and Intranet Sites
  Northern New England Chapter
• Web and Intranet Site Design and Illustration
  Shaf Syed, STC Website
F.Y.I. lists information about nonprofit ventures only. Please send information to intercom@stc.org. For STC’s complete calendar of events, visit www.stc.org/edu/relatedEvents01.asp.

1. Honolulu, HI
2. Berkeley, CA
3. Dallas, TX
4. Sydney, Australia
5. San Antonio, TX


The Professional Communication Society (PCS) of the Institute of Electrical and Electronic Engineers (IEEE) will hold its 2009 Professional Communication Conference in Honolulu, HI, at the Hilton Hawaii Village. For more information, contact:
PCS

3–5 August 2009 2.

The Localization Industry Standards Association (LISA) will hold the Berkeley Globalization Conference at the University of California, Berkeley, Clark Kerr Campus in Berkeley, CA. For more information, contact:
Patricia Egan
+1 (415) 267-4868
patricia.j.egan@gmail.com
www.lisa.org/conferences/berkeley

16–20 August 2009 3.

The International Society of Logistics (SOLE) presents its 44th Annual International Logistics Conference and Exhibition, themed “The Logistics of Global Security,” to be held at the Omni Mandalay Hotel at Las Colinas in Dallas, TX. For more information, contact:
SOLE
+1 (301) 459-8446
solehq@erols.com
www.sole.org


The Plain Language Association InterNational (PLAIN) will hold its biennial conference, themed “Raising the Standard,” at the Four Points by Sheraton at Darling Harbour in Sydney, Australia. For more information, contact:
PLAIN
PLAIN2009@plainenglishfoundation.com

19–23 October 2009 5.

The Human Factors and Ergonomics Society (HFES) will hold its 53rd annual meeting at the Grand Hyatt San Antonio in San Antonio, TX. For more information, contact:
HFES
+1 (310) 394-1811
info@hfes.org
http://www.hfes.org/web/HFESMeetings/09annualmeeting.html


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
amwa@amwa.org
www.amwa.org/default.asp?id=433


The Association for Educational Communications and Technology (AECT) will hold its 2009 international convention, entitled “Integrative Approaches: Meeting Challenges,” at the Galt Hotel and Suites in Louisville, KY. For more information, contact:
AECT
+1 (877) 677-AECT
aect@aect.org
www.aect.org/events/


The American Translators Association (ATA) will hold its 50th annual conference at the Marriott Marquis Hotel in New York, NY. For more information, contact:
ATA
+1 (703) 683-6100
ata@atanet.org
http://atanet.org/conferencesandseminars/annual_conference.php
Words … Fabric … It’s All About Patterns

BY RHONDA BRACEY, Senior Member

M"e? An artist? I don’t think so. I can’t draw, paint, sculpt—can’t do much of what I consider to be traditional art. School art classes were a mix of enjoyment and hatred. Attempts to draw a portrait ended in tears, but designing a repeating wallpaper pattern or a poster was exciting. Instead of presenting a blank canvas as a starting point, these types of art had very defined structures, giving me a framework within which I could be really creative. I’m comfortable with frameworks; fuzzy edges—not so much.

In those long-ago school days, art didn’t explore other mediums. It was all about drawing and painting mediums—oils, watercolors, acrylics, pencils, and inks. Had we delved into fabric, clay, or found objects, I might have been more enthusiastic. Now, some several decades since school, I find myself creating with fabric and trying hard not to call it “art.”

For me, working with fabric is a creative pursuit with an end product that has a practical use—quilts provide warm cover for cold nights, coasters protect table surfaces, bookmarks eliminate the need to fold over corners of pages. I’ve worked with fabric and thread since childhood. I learned to sew on a treadle machine, made my first (shapeless) dress when I was about 10, and then made tapestries for several years. I learned some quilting basics after being inspired by Mennonite quilts I saw in Canada in the mid-1980s. My first quilt project was a queen-sized bed quilt—I’d barely learned to sew small pieces of fabric together! In the early 90s, I also made most of my own clothes until work took over my life and the sewing machine was silenced. When I relocated to a rural area two years ago, I made a decision to cut back my work hours and use the rest of my time to pursue other interests. Our little town of under 3,000 people has two quilt fabric stores—it was time to dust off the sewing machine!

And since I started quilting again, I’ve realized that it shares a basic foundation with technical writing. Surprised? Well, both are like working jigsaw puzzles (which I also love); both are methodical and mechanical in how projects are constructed. They have their own unique vocabularies, building blocks, techniques, tools, and best practices. Both are started with some prep work and completed through a series of step-by-step tasks—you have to do A before B or else it won’t work. In quilting, you begin a project with a plan and/or patterns, just as in technical writing you begin a project with an outline. You start with small pieces, and then bring them together to make a bigger piece, fleshing things out little by little until you have a whole. With plans in hand, you have a pretty fair idea of what your finished piece will look like—whether it’s a user guide or a quilt.

My brain is forever thinking of different ways to combine fabrics based on color, texture, and prints, carrying on an inner dialogue of “This looks right,” and “This doesn’t look right.” Similarly, when I’m writing, I’m thinking of different ways to combine words in a sentence, to combine paragraphs, to switch around topics in a structure. I’m a big fan of single-sourcing content and automating mundane/routine tasks, and that has carried over into my quilting. I’m not a “traditional” quilter in that I rarely hand-stitch—as much as I like sewing and quilting, I’d go crazy if I had to spend several years hand-stitching one project. My sewing machine reduces the tedium of routine and repetitive stitching, just like variables and reusable content reduce some of the routine and repetitive technical writing tasks.

I still tell myself that I’m not an “artist,” but lately I’ve been moving away from quilting patterns and into creating “art pieces,” such as picture postcards that use appliquéd and embellished fabric to capture my memories of the Australian landscape. I’ve also started creating and writing sewing patterns for items like tote bags, bringing together two important facets of my life. Writing patterns is like writing code—you have to test, retest, and test some more. Quilting and technical writing combined—what more could I ask for? ✤

Rhonda (rhonda.bracey@cybertext.com.au) runs her own technical communication and consultancy business (www.cybertext.com.au) in the lush southwest corner of Western Australia. She also has an online Etsy store where she sells some of her fabric art pieces: http://RhondaMadeIt.etsy.com.
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