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As the Green Movement makes us all more aware of the footprint we’re leaving, many organizations are reducing their footprint by cutting back on travel, resources used, and so forth. For those who offer training, the use of video tutorials seems an obvious choice. However, just because you can create videos doesn’t mean you should. Schrankler discusses the factors you need to consider before making the leap to video.

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A note from the editor

NOTICE ANYTHING different about this month’s issue of Intercom? STC has taken the next step in the magazine’s transformation—a cover-to-cover redesign.

While professional designers will no doubt note the myriad changes and improvements in the overall design and templates of the feature articles and regular columns, even the most casual readers will discern the updated look and increased readability. STC is undergoing organization-wide transition and transformation, and it is only fitting that Intercom also adapts to the times.

Technical communicators understand that changes in publication design and delivery are best made in manageable but measurable steps instead of “overnight changes.” Intercom’s evolution this year is no different, involving not just a redesign and new delivery methods, but also a change in staffing and design houses and, therefore, a change in workflow. It’s been a process of taking a step or two forward, waiting for the sand to settle, and then taking another step or two forward. I am aware that there are members who eagerly await this makeover and want everything to happen in one fell swoop, but practical considerations, such as staffing and scheduling, dictate that gradual-but-measurable changes lay the foundation for better long-term improvements.

A number of readers have been generous with their feedback during the first quarter of this year, explaining what works for them and why, and supporting us in our efforts to complete Intercom’s transformation. This feedback has been extremely helpful, and I hope readers will continue to share their comments about each new modification. In exchange, we’ll continue to work hard to provide members with a publication that is engaging and useful, and I appreciate the patience shown to STC staff as we continue to adapt to online publication as our primary delivery method.

Intercom, whether it is read online or in print, is still about content—diverse, relevant, engaging, informative, instructive, and thought provoking—contributed by members and industry professionals. The magazine needs members in order to thrive, and at a time in which STC and the profession as a whole are undergoing great change and challenge, your knowledge and expertise are more vital than ever. Additionally, with four generations working in the field, Intercom is a vehicle through which members can mentor, share, and collaborate with one another. We hope that you’ll continue reaching out to us with your article ideas and feedback, and I am thankful to have such a dedicated and talented group of people with which to work—the STC board, the Intercom editorial advisory panel, the office directors and staff, and many talented authors and colleagues.

Liz Pohland
I am enrolled in an advanced editing course at Utah State University, and it has been interesting to collaborate with other technical communicators from diverse backgrounds. I have found that many technical communicators still edit using hard copy.

With the recent concern and focus on the environment—as demonstrated by increased interest in climate change and in smaller shifts, for example, toward greener items such as reusable grocery bags—it seems like most technical communicators would be open to using electronic editing.

While it is beneficial to employ greener methods, companies have to weigh the pros and cons of new business ideas. For this reason, I wanted to explore the advantages and disadvantages of onscreen editing, pointing out green benefits where possible. My article will hopefully add to the ideas presented in Geoffrey Hart’s 2003 STC conference presentation, titled “Overcoming Objections to Onscreen Editing,” which focuses on the advantages and disadvantages of onscreen editing and the technical aspects and organizational objections.
to this method. I take his case further by examining the environmental advantages and monetary benefits. When I use the term “onscreen editing,” I am drawing from my use of Microsoft Word’s Track Changes and Comments features; however, most of the same advantages and disadvantages apply to other software as well—except for perhaps increased access to grammatical resources.

I began my editing career marking corrections on hard copy. It was not until I was employed as a technical editor/writer for a government contractor to the U.S. Environmental Protection Agency (EPA) that I began editing electronically. Here are some of the advantages and disadvantages of onscreen editing.

**ADVANTAGES OF **ONSCREEN **EDITING**

- Decreased consumption of energy and resources
- Decreased time expenditure
- Increased access to grammatical resources
- Improved recordkeeping
- Improved communication with document production staff
- Decreased monetary expenditure

**Decreased Consumption of Energy and Resources**

In order to edit green, edit as much as possible onscreen. Logically speaking, editors would mark their revisions in the same format as the end product. If the final product will be hard copy, you can edit all drafts onscreen except the final. Otherwise, if you practice your onscreen editing skills, you should be able to edit electronically as proficiently as you would edit hard copy. And, if the final product will be an electronic version, it makes even more sense to edit entirely onscreen.

**Decreased Time Expenditure**

It takes less time to search an electronic copy for a comment or revision than to flip through pages of hard copy to locate all instances of a particular annotation, name, phrase, antonym, synonym, and so forth. While spell check does not resolve all issues, it can help you to quickly fix spelling mistakes within a document. Also, in many instances, it is faster to send electronic revisions back to an author or document production staff than it is to hand-deliver a marked-up hard copy or to fax changes to coworkers. Depending on how much formatting you are required to revise, you can use Word to expedite formatting changes as well; for example, electronic reference checks are faster than hard copy. Additionally, you can compare different versions of the same document in Word to identify new text more quickly than you could in hard copy.

**Increased Access to Grammatical Resources**

While no one should rely solely on spell check and grammar check, these tools—if used correctly—can assist editors. Programs such as Word also include a customizable online thesaurus, online dictionary, and language settings. You can customize your dictionary in Word to include industry-specific terms that spell check might normally mark as misspelled, and you can similarly customize your grammar check settings.

At the end of an electronic edit, you can review your changes to see if you introduced any errors. In addition, you can run a final spell check to:

1. ensure that you have discovered all obvious (i.e., errors that are obvious to spell check) spelling mistakes.
2. minimize the possibility that you have introduced new errors into a document.

You also can use grammar check at the end of an electronic edit to:

1. check for things you may have missed while reading, such as correct spacing between sentences, serial commas, and so forth.
2. minimize the possibility that you introduced new errors into a document.

I’ve noticed redundancy in the vocabulary used in the documents I edit and frequently need to look up synonyms. I used to look them up on the Internet until I found out I could do so within Word; the same is true of the online dictionary. Occasionally, you will encounter words with which you are unfamiliar. When this happens, you can look up their meaning to ensure they are being used properly.

Finally, the language settings in Word can be helpful when you edit documents that use British English. If you read a document that specifies the use of British English, you can set the language accordingly so that when you run a spell check, Word will let you know if a word has been misspelled according to British English standards. This is useful when a document is formatted for British English readers yet contains contributions from American authors.

**Improved Recordkeeping**

Onscreen editing creates a more permanent record of changes. When I edited hard copy, I had boxes of rough drafts in my office, which I kept in case someone had a
question about a previous revision. However, if the office building burned down, I would have been out of luck. Fortunately, most offices keep offsite backups of electronic files. If there ever is a question as to what revisions are made, an electronic copy is more easily preserved.

**Improved Communication with Document Production Staff**

I love editors’ and proofreaders’ marks, but there is room for error with this method of marking hard copy. Document production staff and authors have to learn the marks in order for the system to be effective, and they must be able to accurately interpret an editor’s handwriting. With onscreen editing, those involved in a document’s production can see an example of a change made by the editor, as well as a comment to make similar changes throughout the document.

**Decreased Monetary Expenditure**

Onscreen editing is not only green, but it saves money as well. As mentioned earlier, onscreen editing saves times and involves less paper. While a computer and software are needed, most who edit hard copy already have access to a computer with Word and, therefore, already have the resources necessary to edit onscreen. Because Word offers free online resources, including tutorials on how to use Track Changes, there is no need to spend extra money on training seminars for employees. It is also easy for experienced electronic editors to develop simple tutorials for their colleagues. For example, as part of a class assignment, I am creating a tutorial to help my classmates learn more about Word’s Track Changes features as well as some shortcut tips related to onscreen editing.

**DISADVANTAGES OF ONSCREEN EDITING**

- Increased difficulty in cross-checking information
- Increased difficulty in spotting certain errors
- Increased chance of introducing new errors
- Increased learning curve

### Increased Difficulty in Cross-checking Information

For those who are used to hard copy, it’s easy to check figure and table references in a paragraph on one page against a figure or a table on a separate page in a side-by-side fashion. It is more difficult to do this onscreen, but it can be done. Before I had two monitors, I used to
print off complex tables and figures only so that I could check them against the text while I read. Alternatively, you can open two windows on one monitor and arrange them side by side. If you do have two monitors, you can open the editing copy on one screen and a second copy on the other. I used to check off facts on hard copy; now I electronically highlight the second copy.

**Increased Difficulty in Spotting Certain Errors**
It can be more difficult to spot certain errors while editing electronically, but a good editor can be trained to do so. For example, you can learn from others’ mistakes by reading a book or an article on onscreen editing or by discussing common errors associated with onscreen editing with other technical communication professionals.

**Increased Chance of Introducing New Errors**
If you are careless or rushed, you can actually introduce errors into an electronic copy of a document. For example, a search-and-replace procedure performed in Word can introduce global errors if there is a typo. Or, for example, an error can arise when you mistakenly make a global change to something that should not be altered, such as a corporation name or a reference title. Also, you can introduce misspellings and spacing errors of your own into a document while you add or remove text. Where I work, we have a proofreader who proofs all electronic edits for these very issues. If you do not have such a luxury, you can choose Final view in Word’s Track Changes mode and proof your own revisions. It should take you less time to do this than it would to have to explain your hard-copy annotations to someone else.

**Increased Learning Curve**
It takes time to learn how to use the Track Changes and Comments features; also, it can seem daunting for beginners. To edit electronically, you must familiarize yourself with how to use onscreen editing tools; there is certainly a learning curve. And while it can be tough being an old dog learning new tricks, enhancing our skills bolsters our résumés. For example, I used to teach, and digital media certainly changed the way I taught. I went from the chalkboard to a SMART Technologies SMART Board. Editors who refuse to adapt to change will eventually be left behind—as will companies who refuse to keep up with advances in technology. Moreover, the global community is moving toward an increased focus on the environment. It can only benefit a company to take a more proactive stance on green strategies.

**If It’s Not Easy Being Green, Why Should I Bother to Edit Onscreen?**
We are all part of a global society. More and more, I read about the effects of pollution on the environment. I do not live in isolation; the choices I make affect those around me. The amount of packaging I purchase and discard affects the local landfill. The chemicals I use affect the surrounding air, soil, and water. My choice to edit hard copy affects others as well, and so I make a conscious effort to help the environment. If you ask me why you should edit onscreen, my simple response is that it’s the right thing to do. It has taken me time to reach this point; the switch to onscreen editing required me to step outside my comfort zone and learn new skills. But, if I can make the switch to onscreen editing, then anyone can.

**Recommendations**
For previously mentioned reasons, I recommend obtaining a second monitor, if possible. In addition, you could try to obtain a larger monitor (perhaps an LCD monitor with energy-saving features) for viewing two windows at once.

Finally, I recommend spending time reading about others who edit onscreen or talking with other editors who edit electronically. Opportunities to network and collaborate abound in professional organizations such as the STC, in online groups found on Yahoo and Google, and through social networking platforms such as LinkedIn. If you already edit onscreen, be willing to (patiently) help and mentor those who are making the transition. The mentoring relationship will not only help others, it will help you to reaffirm your existing knowledge and potentially identify areas for skill expansion.

**REFERENCES**

The Evolving ROLE

Technical Communicator as Video Tutorial Producer
Maybe it’s not entirely comparable to the arguments for Darwinism or creationism. But there’s no denying it: the role of the technical communicator is transforming. The role of the technical writer evolves constantly, and now it’s producing writers who focus on technical training, project management, development and engineering, or other specialties. These subsets don’t always fit one specific mold.

Twenty or thirty years ago, technical writers primarily focused on writing instructions and other documentation for the use of machinery. A specialized group of people built the machine. Another group created and facilitated courses to teach people how to use the machine, and technical writers documented the processes start to finish. But with the growth of organizations, the merging of positions, and the rise of multitasking, these separations aren’t always feasible or applicable for organizations.

Although videos have been traditionally used for technical training, traditional technical communications take the form of user manuals, help documentation, and instructional guides. Technology has arguably blurred the lines between “traditional” technical communications materials and “traditional” technical training materials. Technical writing has begun to morph with technical training. The once-clear difference between documentation and training now lends itself to the ever-growing trend of super hybrids. Just do a search for “technical writer” or “instructional designer” on any popular job search engine; you’ll find that the title “Technical Writer” today requires us to understand and create job aids, e-learning content, and learning management systems along with all the traditional user manuals, audience analysis, and usability testing.

**Tradition No Longer Holds True**

Take a closer look at the traditional definitions of help documentation versus training.
Traditional help documentation addresses broad audiences. Traditional technical training addresses more specific audiences. Help documentation isn’t meant to address a broad audience anymore. Although help documentation can address a broad audience, how many times do we see things like Guide for Administrators or <Insert topic name here> for Dummies? As technical communications evolves, more of us are finding a need to write audience-sensitive help documentation.

Traditional help documentation is function-oriented; it focuses on the “what.” Traditional technical training is task-oriented; it focuses on the “how.” Although it can be true that help documentation includes function-oriented content, it’s not true that help documentation does not include task-oriented content.

Traditional help documentation is unidirectional. Traditional technical training is interactive. Unidirectional help documentation may hold true with the simple printed manual you find in the box with your new DVD player. But with fully integrated enterprise knowledge systems, context- and audience-sensitive help, and even the functionality offered with complex online help systems, help documentation is nonlinear and more interactive than ever before.

Traditional help documentation includes information about everything. Traditional technical training only includes information about the fundamentals. Although this definition may still hold true for training, you can’t include everything in help documentation without including the fundamentals. Providing the fundamentals helps authors, instructional designers, and technical trainers avoid an area of overlap.

Traditional help documentation is usually delivered through written text (print and HTML). Traditional technical training is usually delivered through an instructor or video. With evolving technology and new products available on the market, video tutorials are increasingly replacing traditional help documentation. More instructor-led training is delivered without an instructor via computer-based training (CBT). It’s common for training materials to be delivered in print or HTML, and for help documentation to be delivered through something that looks an awful lot like CBT and videos.

Traditional help documentation is descriptive, clarifying, and explanatory. Traditional technical training focuses on improvement of skills or performance. In help documentation, the purpose should be descriptive, clarifying, or explanatory. The result helps the user accomplish a task, improve their skills or understanding, and improve performance overall.

Traditional help documentation provides less opportunity for evaluation and feedback. Traditional technical training allows for continual evaluation, feedback, and improvement. Past and present help documentation—whether delivered online or in print—provides less opportunity for evaluation and for feedback from users/readers. Most technical training provides some sort of facility to survey or collect evaluation and feedback from participants, allowing more opportunity for continuous improvement. However, tools that provide wiki- or forum-like help documentation (e.g., Adobe AIR) are beginning to blur the lines between training and help documentation. Good help documentation relies on interaction, participation, and sharing of knowledge from large user groups.

Traditional help documentation is ongoing. Traditional technical training is one time. Traditionally, help documentation is available to the user/student “forever.” Training, however, is available for only a limited time (i.e., during the training session). With the introduction of CBT courses, enterprise knowledge systems, and learning management systems, organizations can allow training and training materials to be available for reference long after the course is over.

The Handshake Between Help Documentation and Training
The truth is, in today’s market, the help documentation doesn’t work as well without adequate technical training and the technical training doesn’t work as well without help documentation to reference after the training is over. There’s a logical cross-over relationship between creating help documentation and user manuals and creating training and instructional materials. As technical writing and technical communications evolves, it’s the job of technical communicators to evolve their skill sets to meet the needs of their audiences and prove to be a valuable asset to any organization. This new skill set includes learning to plan, write for, and produce high-quality video tutorials.

The Can vs. Should Dilemma
Time and technology have blurred the lines. Once solely responsible for writing procedural manuals, technical communicators are now well-rounded, interdisciplinary employees. They are project managers, help system developers, help authoring software tool experts, communication destiny makers, and ... video-producing machines?

The technology used in video screen-capturing software and online help system video-embedding functionality allows help writers to expand their skill sets with ease to include video tutorial production. Technological advancements, user-friendly software, and a low purchase cost make it possible for anyone to record and produce video tutorials. However, just because you have the ability or opportunity to do something doesn’t mean you should (or that you know the best way to do so).

In a nutshell, video screen software captures the actions taken within one or more software applications. This develops a video of those actions (think of an old-fashioned cartoon). The software takes a series of still shots of the computer or application screen. It then strings these still shots together, so that when “played” it looks like the
actions were recorded like traditional video. Often, the viewer cannot detect when the video transitions from one still shot to another. Most video screen-capture software packages also allow for:

- video editing
- inserting other graphics and still shots
- applying audio files
- creating captions within still shots
- using a timeline that allows items and resources to appear/play at the right time

In general, video screen-capture software tools are easy to use. Most users require little or no training. Video screen-capture software tools are a relatively inexpensive means of creating videos that provide high-quality, professional output.

### The Pros and Cons of Video Tutorials

The biggest advantage of using video tutorials to supplement or replace traditional “written” help documentation is that, simply put, it’s impressive. As far as other advantages are concerned, although they definitely exist, video tutorials for technology user assistance are being overused because they’re easy to create.

#### The Pro List

**They’re impressive.** To people who are not avid tutorial users (or who have already developed a bias against video tutorials because of all the badly developed ones available on the web), video tutorials simply look cool.

**They’re great for first-time users and technophobes.** For people who are not familiar with your product, need a place to get started, or are scared of trying something new, a video tutorial is much like a security blanket. Tutorials can make users who fall into this category feel like you spent a lot of time caring about their needs.

**They can be reused for sales.** Providing video tutorials on your sales webpage can help convince prospective customers that your product’s features are as good as you say they are because they can see them. This sales technique is similar to allowing users to download a trial version of software. Video tutorials can be a great tool for describing and displaying new features of your product.

**They clarify your intent.** Visual aids clear up discrepancies. Although screen shots and arrows are a major part of text-based tutorials, there are cases when the ability to show outweighs the ability to tell.

**They can be effective user assistance tools for people with different learning styles.** As we all know, there are different kinds of learning styles. Auditory learners learn by listening, and thrive in environments that use lectures. Visual learners learn best by watching, and kinesthetic learners learn best by reading. In most cases, a single learner can have a combination of learning styles.

Typically, screen shots, pictures, illustrations, and text are just as adequate for the learner as a whole video demonstration. Additionally, there are people who will learn information faster through video alone.

#### The Con List

**They can be a maintenance nightmare.** When a screen or a few steps change, help documentation is relatively easy to maintain. You may have to take a new screen shot or update your text, but you don’t have to reinvent the wheel.

Unfortunately, video tutorials aren’t as easy. Although most video screen-capture software tools allow you to remove certain slides from your video, then record and insert new slides, it can be difficult to make this transition look natural. At times, it could require re-recording, and essentially re-producing, the entire video. It takes more time and more planning to maintain videos than text.

**They’re not great for users who need a quick refresher.** In these days of instant gratification, users get frustrated when they have to sit through 10 minutes of video to find the 10 seconds of information they want. Although this can be mitigated with good planning and several short videos rather than fewer longer videos, nothing beats the ability to type keywords and find little chunks of relevant information in a matter of seconds. Doing a quick search through popular blogs discussing the benefits of video tutorials over help documentation, you’ll find the following points:

- Video tutorials make it hard for viewers to skip to the information most important to their specific situation.
- People can read text faster than viewers can view a video.
- Text allows you to spend as much time as you want on a certain step (text allows you to be self-paced); video tutorials deliver information at their own pace.
- Speakers (audio) frequently get side-tracked by information outside of the initial scope of the video.

**They were originally designed for e-learning.** Most video capture software tools were originally designed to develop e-learning videos. Although there’s an overlap between the role of a technical communicator and an instructional designer/technical trainer in thousands of organizations, some additional planning and consider-
ation has to be given to using these tools to create pure help documentation rather than e-learning or training materials.

They’re not as reusable as text tutorials. Just like the problem with maintaining video tutorials, reusing the actual video for a different purpose is not as easy as reusing text for a different purpose. For example, if you create three user guides for the same software application targeted toward three separate audiences, some text and screen shots between the user manuals may be reusable. However, if the entire video tutorial is not reusable, in most cases a separate video will have to be planned, recorded, and published.

They can’t be parsed by search engines. For those worried about search engine optimization, it’s important to note that only the title (or a textual summary about the video) can be parsed by search engines, and not the content in the video. Beware of including sales information, features, and benefits as audio or captions in video tutorials alone (e.g., not including supplemental text on your website).

Replacing Text With Video
Video tutorials should always be supplemental to help documentation or text tutorials—not replacements for them. In many cases, you will not simply be video-itzing your written text tutorial but creating a video tutorial that supplements the documentation you’ve already created. You shouldn’t overuse video tutorials just because you recently learned how to create something that looks cool and initially impresses your coworkers and a few potential clients. Although you’ve expanded your traditional technical communicator role into video production, you’re still a technical communicator. You should still have the goal of providing the user with the best assistance possible—which is not always a video tutorial.

Guidelines to Making the Right Decision
Before planning and writing your script and recording your video tutorial, make sure that the video’s concept passes the “Should You or Shouldn’t You Test.” Although you may find a need outside of the information provided here (i.e., a special request from a client), in general the concept you are planning for your identified video tutorial should follow these general guidelines.

It’s all about the fundamentals. It’s acceptable to create video tutorials for a task or information that’s fundamental to user success. These video tutorials should supplement help documentation or text tutorials. They should also provide you with several of the advantages listed earlier, including:

- “Wow” factor
- Accommodation for different learning styles
- Appropriateness for first-time users or techno-phobes

This does not mean you should create a video tutorial for every concept or task. But you should pick the top three (or five or ten depending on the amount of functionality offered by the product) that are most common.

“Make me quit” concepts. It’s always important in any kind of user assistance or help documentation to thoroughly cover concepts and tasks that users seem to struggle with the most. You can usually identify these pain points by talking to and gathering information from your user community. Another good rule of thumb is that if you (the help writer) understand most concepts and tasks within the product you document but are struggling with one or a few concepts yourself, others will probably struggle as well. Misunderstanding these concepts can become so frustrating for users that it makes them feel as if it is too complicated, and, as a result, they don’t want to use it.

Regular occurring tasks with long duration frequencies. It’s often appropriate to create a supplemental video tutorial for tasks that must be performed on a regular basis, but the frequency of that regular basis is considered a long duration (e.g., a task that must be completed annually or semi-annually). These tasks are good candidates for video tutorials because they’re fundamental but are performed so infrequently that users feel like first-timers every time.

Information that is pertinent to success but not covered in technical training. As technical communicators begin to bridge the gap with instructional designers and technical trainers, it’s important to work together to determine information, concepts, tasks, and so forth that there isn’t enough time for or resources available to cover in technical training. This information is well-suited for video tutorials and is supplemental to help documentation, text tutorials, and technical training.

You may find that the concept for your video tutorial falls into the category of multiple guidelines listed—and the more, the better. If you can create an argument for your video tutorial concept that meets two or three of the guidelines, it’s probably a great idea to move forward and create your video. If you’re on the fence about whether your concept for a video tutorial falls into any of these, rethink the benefit to the viewer. Most users, if given the choice, would rather have no video tutorials than a catalogue of poorly conceived and poorly implemented ones.

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IF YOU HAVE EVER been to a social gathering or a meeting where most people don’t know one another, chances are you wore a name tag. Its most frequent purpose is to learn a person’s name; they save time because you don’t have to ask and you don’t have to remember. If you have ever forgotten someone’s name just a few minutes after they told you, then you know how valuable that piece of paper on that person’s chest is. Another example is in the classroom, where new or substitute teachers find them invaluable for streamlining the teaching process; they work better than saying, “the guy in the orange shirt.”

But name tags are not just for learning names. They also can be used as a “uniform” on civilian clothing, giving all wearers a sense of camaraderie and belonging, an admission ticket for entry into a venue, or even as a status symbol. Preprinted versions include not just a name but also titles, logos, sponsors, and demographic information. At conferences like the
annual STC Summit, participants adorn them with ribbons, speaker pins, and other paraphernalia (see Figure 1).

If you’ve been charged with designing name tags for mass distribution, here are some low-cost, paper-only design suggestions:

- **Make them big, at least 3 inches x 4 inches.** Bigger name tags allow for bigger fonts and easier reading—the bigger the better. This holds true for preprinted and handwritten versions. People cherish their personal space and don’t want acquaintances leaning in too close to read their names.

- **Make the most important thing the biggest thing.** Know why people need to read name tags? What are they looking for? Usually, it is the first name. Typically, it is not the logo, the name of the event, or even the last name. Use all capital letters. Other text can be upper- and lowercase. Depending on your audience, the name may not always be emphasized. Sometimes it can be a mug shot to flash in front of the security officer at work. Or it can be a title as shown in Figure 2. In this case, people do not need to know the person’s name, just that the guy holding the camera is an official photographer.

- **Keep them simple.** Use an easy-to-read font, such as Arial Bold. Don’t clutter it with too many other labels. A few are okay, but you may be tempted to fill a bigger name tag with more stuff, which smudges the name (see Figure 3). Some of this information is more for the benefit of the wearer and not the reader, thus, you can add it to the back side of the name tag. If you do that, make sure the paper is thick enough that the reverse side does not show through.

- **Think outside the box.** In situations where you have to handwrite your own name on a blank name tag, use more than one tag. This is especially helpful if you have a long name like mine with nine letters. Instead of cramming all nine onto one name tag, I stick two together to make a larger one. Whether you use one or more, write neatly and legibly using the rules in the second point above. Depending on the event, if you are sitting behind the registration table and you are using handwritten name tags, do people a favor and handwrite their names for them. Also, use a felt-tip pen or marker instead of ballpoints.

In light of keeping them simple, consider odd-shaped name tags, adding nicknames or trivia. People want to know more than just the person’s name. Make it an ice-breaking tool.

- **Choose your holders and lanyards carefully.** Make sure they don’t detract from the name tag. At one conference, I decided the lanyard was too cumbersome, so I switched to a clip-on but kept the actual name tag. When I tried to enter the convention hall, the gatekeeper stopped me because of my unusual holder. At first she thought I was not a patron. After explaining to her what I had done, she took a closer look and let me in. She was looking for lanyards and not name tags. Also, use short lanyards to keep name tags closer to eye level and not down at belt buckles. If you decide to use clip-on devices, allow enough room for the hole into which the clip/clasp is fastened.

- **Don’t use business cards as name tags.** They are just too small and were not designed to be read from a distance.

- **Test them for usability.** Show your draft design to a colleague. Shake hands with someone wearing a prototype. Can you read it? Can they read yours? Wear the actual holder that goes with it. Some lanyards have a habit of flipping the name tag over.

  Whether they are preprinted or handwritten, name tags can help a lot with communication and networking. You are, after all, designing a document the size of a few square inches to be read and understood in a few seconds. Are you up to the challenge?

Nathaniel Lim (nlim@elekta.com) is a senior technical writer for Elekta Inc. A member of the Silicon Valley Chapter, he has been a speaker at various STC events and has been collecting name tags since 1990.

**Figure 1.** STC Summit name tag.

**Figure 2.** A simple name tag that shows the event logo and title.

**Figure 3.** Name is lost among too many elements.

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**SUGGESTED READINGS**

Actively Managing Your Schedule

BY GEOFFREY J. S. HART | FELLOW

UNCERTAINTY IS THE only certainty of a freelancer’s life, but it’s also a problem that afflicts wage slaves, as I learned during the first 15 years of my career. Something unexpected always seems to be popping up, disrupting our carefully crafted plans and leading to long days and late nights.

Fortunately, there are ways to make life less uncertain than it might otherwise be, and each involves actively managing our schedules rather than waiting for others to define them for us. Active schedule management involves three types of activity:

- Understanding your client’s business
- Managing your client’s schedule
- Planning for the unexpected

Throughout this article, substitute “colleague” for “client” if you’re a wage slave rather than a freelancer. The meaning is the same, since most technical communicators provide a service (e.g., writing, editing) for other people, whether those people are freelance clients, product developers within the company, or the direct manager.

Understand Your Client’s Business

If you invest some time thinking about your client’s business, you’ll almost always be able to identify certain predictable trends. Many are obvious, such as annual reports, but others become obvious only in hindsight or through repeated surprises that occur over months or years of work with a client. You can discover those patterns by continually tracking the work you do for each client and looking for signs of repetition. This isn’t rocket science: all you need is a Word document that includes monthly headings for each client, followed by bullet points that begin with the date of each assignment and conclude with its name. If the same date appears in each month (e.g., a monthly status report that requires editing) or each year (e.g., a software release), that repetition indicates a pattern.

In particular, look carefully for recurring annual patterns, since annual projects tend to be larger than monthly projects and demand correspondingly larger amounts of time. These patterns typically revolve around

- The end of the fiscal or calendar year
- The months before annual trade shows specific to your industry
- Deadlines for funding proposals to government or other agencies
- The weeks before the peak staff vacation period
- Other company- and industry-specific events

Also, stay alert for workplace changes that provide clues to deadlines that won’t reoccur regularly. For example, if you learn through the grapevine that a client will be traveling, leaving on maternity or paternity leave, taking a sabbatical, or moving to a new job, ask yourself whether this might create new work for you. If so, contact the person as soon as you learn of their departure to inquire whether they’ll need you before they leave.

To see how this works in practice, consider my year. I work primarily as a freelance scientific editor, and most of the research done by my clients occurs during the summer field season rather than in a lab. As a result, the first three to four months of the year are times when many clients are frantically trying to finish up last year’s writing so they can begin the new year’s research. A government client has a fiscal year that ends on 30 March, and they know the current year’s money won’t be added to next year’s budget, so they send me a ton of new work in early March. I’ve learned not to expect much free time during this period. Conversely, late April and early May tend to be relatively slow because the field researchers have left the office for the summer. That means April and May are my prime vacation time.

Every industry has unique patterns. In commercial book publishing, for example, the Frankfurt Book Fair (www.frankfurt-book-fair.com/en/) may represent a crucial deadline. If you edit books for the publishing industry, ask your clients whether they expect to produce any books for the coming Fair; if so, ask how far in advance their editing deadline will be. The same principle applies to consumer electronics, for which the International Consumer Electronics Show (www.cesweb.org/) dominates the lives of many technology writers and editors. For information technology, the driver may be Interop (www.interop.com/), formerly known as Comdex. Each technical communication field will have similar annual events.

The key point is that understanding your client’s business provides advance warning that lets you find ways to manage your schedule.

Manage Your Client’s Schedule

The passive approach described in the previous section has merits, but its primary drawback is that it leaves you entirely at the mercy of your clients. Why not try to actively manage their schedules rather than letting them manage yours?
At a former employer, every research group developed annual research plans that identified when researchers planned to begin and end each project and what documentation “deliverables” would result. The passive approach would involve simply adding these planned deliverables to my calendar. But by understanding this plan, I was able to contact individual researchers weeks before a project was scheduled to end so I could learn the status of their research and the associated writing. Knowing the big picture helped me identify busy periods, and knowing the authors let me figure out who to help so their writing would be complete before or after those periods. Shuffling the work this way let me reduce the workload during the busy periods.

For example, I knew one author always had trouble meeting his deadlines and always waited until the last possible minute before delivering a nightmare edit. To avoid this, I offered to work with him several weeks before each deadline to produce a killer outline for his reports. The outline made it easy for him to complete the report the following week, ensuring that it didn’t arrive several weeks later during my crunch. Conversely, an unusually proficient writer had earned the right to deliver his reports a few days later than planned because his manager knew they wouldn’t require much editorial or review work. With him, I could negotiate a delay of a day or two in delivering his manuscripts when I needed the time because the delay wouldn’t affect the overall schedule.

Better still, I managed (with help from managers) to implement planning meetings for each research project. At these meetings, authors would summarize their research so I, their manager, and the research manager could review the proposed manuscript and commit the author to a writing deadline. I then worked with each author to develop an effective outline for each manuscript based on the meeting results, thereby making their writing process far more efficient. (I’ve described this in my article “Effective Outlining” at www.geoff-hart.com/articles/2006/outlining.htm.) The added benefit was that I learned when to expect their work, and could propose a time that was more convenient for me but that wouldn’t affect the overall schedule.

If you’ve developed good relationships with your clients, you can simply ask them about recurring or unique events in their work. Each will know of deadlines you’d never learn about otherwise; the better-organized ones even learn to alert you to imminent work well in advance so they can reserve your time. For example, most publishers plan their publishing schedule months or years in advance, and some update the schedule quarterly as part of their budget review process. Some clients will even provide access to their work calendar (either directly or as a PDF file) if you ask nicely. If you know they’ll update their plans quarterly, as part of an ongoing review process, add a note to your reminders program (e.g., Outlook) to request an updated schedule at these times.

These suggestions relate to client-defined deadlines, but you can also define your own deadlines and use that as a tool to motivate clients to modify their schedules. For example, whenever I know I’ll be away for more than a few days, I send out announcements such as the following to all my clients at least a month in advance:

“I will be traveling from 12 to 26 May and will be unavailable for work. If you have any editing work for me that is due before I leave, please reserve a date now or send me your manuscript at least 2 weeks in advance (i.e., by the end of April). Because of my workload, jobs that arrive without a reservation may have to wait until I return.”

This provides much more lead time to complete my work because fewer jobs arrive unannounced at the last minute. As a freelancer, it has another benefit: it reminds clients who only occasionally send me work that I exist and that they haven’t sent me any work for a while. This often leads to new work arriving that might otherwise not appear for months. I send a similar message whenever I know I’ll be insanely busy during a future period (e.g., for me, every March).

The key point in managing the schedules of your clients is that you can often find ways to encourage them to submit their work at times that are more convenient for you, thereby evening out your workflow.

Plan for the Unexpected

The best laid plans inevitably go astray. Some work inevitably arrives unannounced and at the last possible instant, and I have to find ways to cope. In my article “Managing the Chaos of Freelancing by Taking Control of Your Schedule” (www.geoff-hart.com/articles/2008/scheduling.htm), I described ways to estimate the time required to complete work and allocate your available time accordingly. The key points in that article are that you can’t plan your schedule if you don’t know how long work takes to complete, but that once you know this, you can use the knowledge to build some slack into your schedule. That way, when the inevitable surprises occur, you’ll have more flexibility to adjust your schedule and to find ways to cope.

Look for other tricks that will help you manage your schedule. For example, when I was a government employee, I routinely received a ton of last-minute work right before I left for vacation. The solution was to find a way to make that work arrive a few days earlier so I had more time to complete it. If I knew, for example, I would be leaving on 12 May, I would inform all my clients that I was leaving a day or two earlier—say, on 10 May. That gave me roughly two days to complete any unplanned last-minute work, including other work I had put on hold while getting through the previous week’s crises. There’s no question this was mildly unethical, but, in practice, the last few days before a lengthy absence were always time I required to clear my desk before leaving or to finalize details of my work plans for colleagues who would carry on while I was away. Building in those extra two days generally let me leave with a clear conscience rather than leaving a mess for my co-workers to clean up.
Haven’t Registered for STC’s Summit Yet?

TIME IS RUNNING out to register for STC’s Summit, taking place 2–5 May in Dallas, TX, at the Hyatt Regency Dallas. The Advance rate of $995 USD for members expires on 20 April; after that, the Walk-in rate of $1,195 USD takes effect. Members can also purchase a One-day rate at $445 USD.

The Technical Communication Summit, STC’s 57th annual conference, offers extraordinary opportunities for in-depth exploration of hot topics in technical communication. Take advantage of:

**Preconference Certificate Programs**

This year, the certificate programs will be held Saturday, 1 May, and Sunday, 2 May, from 8:30 AM through 4:30 PM. Attendees can choose from Content Management, Instructional Design for e-Learning, TechComm 101, and Communication Manager.

**Preconference Workshops and Tutorials**

For those desiring an additional, but shorter, preconference learning experience, STC will offer seven half-day and two full-day preconference workshops. The full-day topics are Introduction to Information Mapping for Technical Communicators and Topic-Based Authoring: Getting Your Feet Wet. For half-day topics, choose between Career Tactics for Technical Communicators, Developing and Designing Blogs with WordPress, Essential UX Skills for Technical Communicators, and Hands On: Minimalism, DITA, and Content Management Workshop in the morning session. In the afternoon, your options are A Quick Look at Adobe Captivate, Architecting Content: Content Strategies, and Teamwork and Creativity: Seriously, Let’s Play.

**Conference**

Conference education sessions cover a wide variety of topics and are organized into nine tracks: Communication and Interpersonal Skills; Design, Architecture, and Publishing; Education and Training; Emerging Technologies; Managing People, Projects, and Business; Professional Development; Usability and Accessibility; Web Technologies; and Writing and Editing.

**Institutes**

The Summit also offers Institutes, which are conferences-within-the-conference designed by experts in the field and featuring invited speakers with extensive and unique knowledge of their areas. Each Institute consists of conference sessions, runs concurrently with other sessions during the Summit, and is included in the conference registration fee. Institutes include: Usability, Content Strategy, Information Design, and Localization.

In addition, you’ll be able to network with your colleagues—top technical communicators from around the world. Your conference registration will also get you access to the Expo, where over 50 vendors stand ready to showcase their new products. And you’ll be able to listen to Honorary Fellow and Keynote Speaker Erin McKean as she speaks about her love of words.

View details of all of the above—including dates, times, and full descriptions—and register online at http://conference.stc.org.

Follow the 2010 Summit on Twitter

Once again, you can follow the 2010 Summit via Twitter—and even get a little taste of the conference to boot! Prior to the conference, follow the username @stc2010 for all the official announcements and information on speakers, preconference courses, and more. Once the Summit starts, check out the hashtag #stc10. Attendees are invited to tweet from the conference using that hashtag, which will allow anyone to view their comments by searching on the hashtag. The conference website (http://conference.stc.org) will have a live stream of tweets during the conference as well.
BY MICHAEL HUGHES
STC First Vice President

THERE ARE THREE reasons I go to the STC Summit, and I’d like to share them with you.

1. Network.
I think of the Summit like Twitter and Facebook in 3D. It’s the latest craze after virtual reality—it’s called reality! This is my opportunity to meet face to face with current contacts and make new ones. As I look at my social networking online, the vast majority of the people I contact with any frequency are the ones I have nurtured through face-to-face conferences and committee work. Jump start your network at the Summit or revitalize those contacts that will be your content and opportunity lifelines in the future.

2. Get smarter.
I can’t think of any other profession that goes through the amount of technical churn and turnover that technical communication does. That stack of books and magazines I’ve been meaning to read is not getting any smaller. The sessions at the Summit are my shortcut to catching up on this field that tries to leave me behind at every opportunity. It’s the living CliffsNotes of everything that’s happening in our field right now.

3. Have fun.
Spend time with some of the most interesting people in the world. Commiserate, celebrate, plot, and party with the technical literati. Walk among your own kind for a few days and celebrate who you are and what you do. See you in Dallas!
Committee Seeks Candidates for Society-Level Positions in 2011

Would you like to be a part of leading STC and ensuring that it remains a vital organization? You—and other members whom you know and respect—could have the chance by running for a Society-level position in 2011.

Do you have experience directing the implementation of new ideas? Do you want to coordinate programs that are beneficial to our profession? Are you ready to use your strategic skills to take STC to the next level?

If your answer is yes, contact the STC Nominating Committee and let them know you are interested in running for office. If you know another member who should be considered for a position on our international board, please pass on that person’s name, too.

The Nominating Committee will consider all recommendations as it draws up the 2011 slate of candidates. As part of the committee’s review process, it will contact all potential candidates to confirm their interest in running for STC office.

Mark Clifford ([mark@cliffordsells.com](mailto:mark@cliffordsells.com)) of Bedford, NH, has been appointed Chair of the 2010–2011 STC Nominating Committee. The other members are Sandra W. Harner ([harners@cedarville.edu](mailto:harners@cedarville.edu)) of Cedarville, OH, and Suzanne Guess ([suzanne@210comm.net](mailto:suzanne@210comm.net)) of Des Moines, IA. Please feel free to discuss your ideas with any of these individuals. Two additional nominating committee members will be chosen in the 2010 election, but results were not available at press time.

STC would like to thank the following individuals for serving on the 2009–2010 STC Nominating Committee: Jackie Damrau, Chair; Thea Teich; and Carolyn Klinger. Thank you for sharing your time and ability.

Open Positions & Qualifications

In the year ahead, the STC Nominating Committee will develop a slate of candidates for the following positions:
- Vice President
- Treasurer
- Director (two positions)
- Nominating Committee member (two positions)

The STC Board of Directors depends on experienced business, academic, or Society leaders. All candidates should be senior members, have experience working at a strategic level, be comfortable making decisions collaboratively, and be focused on outcomes. Ideally, they should have Society-level leadership experience, but key to these roles is strategic business experience or a strong academic background with professional skills managing people, projects, and budgets. Being an STC board member is a chance to leverage these skills, to learn how to lead a nonprofit organization, and to ensure that the Society continues providing members with opportunities, services, and more. Candidates interested in a position should also have the following characteristics:

Candidates for Vice President must be passionate about the technical communication industry, have in-depth knowledge of Society-level processes and practices, and be experienced in implementing large business, policy, or educational initiatives outside of STC.

Candidates for Treasurer must be familiar with accounting principles; have the interpersonal skills necessary to work well with STC’s staff, especially in preparing an annual budget for board approval; possess good analytical and strategic thinking skills; and have the ability to oversee the Society’s finances and deliver financial reports to the Board of Directors and the members at the annual business meeting.

Candidates for Director should have some STC community-level experience and background, including strategic business experience or a strong academic background, with professional skills managing people, projects, and budgets.

Candidates for the Nominating Committee should have excellent judgment about people and be well acquainted with members at all levels of the Society. They also must have the potential to understand the goals of the Society so that the candidates they select can meet the needs presented by those goals.

The Nominating Committee welcomes your suggestions about potential candidates for the positions listed here. If you think that you or someone you know should be considered, please fill out the application form on the next page, or download it from the STC website ([www.stc.org](http://www.stc.org)) under Members/Admin Docs, and return it to STC by 1 July 2010 (see address and candidacy form on the next page).
Candidates for Society Office

Check the appropriate box below and provide the necessary information.

☐ I would like to be considered for the office listed below.

☐ I would like to recommend the person listed in the following section for the office listed below.

Office:

Enter the appropriate information below to recommend another member or yourself for office.

Your name (if recommending another member):

Daytime phone:

Time zone:

Email:

Prospective candidate's name:

Address:

Daytime phone:

Time zone:

Email:

Filling out this form is only a preliminary step in the nomination process. Additional information will be sent to you or the person you recommend. Please remember that when STC members consent to be candidates, they do not automatically become candidates.

PLEASE RETURN A COPY OF THIS FORM BY 1 JULY 2010 TO THE FOLLOWING ADDRESS:

SOCIETY FOR TECHNICAL COMMUNICATION
Attn: Nominating Committee
9401 Lee Highway, Suite 300
Fairfax, VA 22031-1803
Fax: +1 (703) 522-2075
Or email to: stc_election@stc.org

QUESTIONS? CONTACT DIANA BUTTRAM AT DIANA.BUTTRAM@STC.ORG, +1 (571) 366-1919.

Frank R. Smith Award Winners Announced

EACH YEAR, the editor of Technical Communication appoints a judging committee to select the outstanding article from the previous year’s issues. Judges base their decisions on article content and form. The award honors the memory of Frank R. Smith, during whose 18-year tenure as editor Technical Communication became established as the flagship publication of STC and the profession. This year’s judging team for the Frank R. Smith competition consisted of Saul Carliner (chair), Roger Munger, and Vici Koster-Lenhardt.

The judges are pleased to announce that the Frank R. Smith Outstanding Article Award goes to Han Yu for her article “Putting China’s Technical Communication into Historical Context: A Look at the Chinese Culinary Instruction Genre” in the May 2009 issue of Technical Communication. The summary for the article states that it “examines the Chinese culinary instruction genre, analyzes culinary texts produced from 500 BC to the present, and argues for a historicized and contextualized understanding of technical communication in China.”

The article was cited for being “an analysis of recipe books that concludes there’s no recipe book for cross-cultural communication. This article raises questions about Western-based conceptions of Chinese culture, and challenges readers to develop, instead, a deeper understanding of that culture and its context.”

In addition, the judges also named a Distinguished Article for the year. Congratulations to Nicole St. Germain-Madison, lauded for her article, “Localizing Medical Information for U.S. Spanish-Speakers: The CDC Campaign to Increase Public Awareness About HPV,” in the August 2009 issue of Technical Communication. The judges praised the article as “a solid research study that offers practical insights into cross-cultural communication.”

Congratulations to both Han Yu and Nicole St. Germain-Madison for their excellent work.
Distinguished Chapter Service Awards

THE SOCIETY FOR Technical Communication has long recognized the importance of the hard work and commitment of its chapter members. Without their energy and enthusiasm, the Society would cease to be the largest, most effective, and most prestigious organization of technical communicators in the world.

In 1988, the Society initiated the Distinguished Chapter Service Award (DCSA) to recognize exemplary dedication to the chapter and its activities. The first awards were presented in 1989. Following is a list of DCSA winners for 2010 with their official citations.

**ALBERTA**

**Mai-Ann Sprung**

In recognition of your exemplary leadership and outstanding contributions to the profession and to STC Alberta—for your wisdom, dedication, enthusiasm, and vision.

**CENTRAL IOWA**

**Geoff Sauer**

For pouring your insight, knowledge, and energy into making STC-Central Iowa a stronger, more valuable community for our members.

**CNY**

**Elaine Montambeau**

For dedication and excellence in leading our small but vast chapter and providing outstanding program and web services as well as warm support for us all.

**FRANCE**

**Ellen W. Lebelle**

For your selfless and sustained contributions to the STC France Chapter. For being the first to arrive at—and the last to leave—all our events. For your wisdom, experience, and dedication to the profession.

**HOUSTON**

**Cathy Bettoney**

For your loyal support, exceptional service, unwavering commitment, and numerous selfless contributions to the STC Houston Chapter.

**HOUSTON**

**Alyssa Fox**

For your dedication and continuous contributions to the success of the STC Houston Chapter.

**INDIA**

**Makarand Pandit**

For leadership in establishing the India Chapter and for sustained enthusiastic contributions to the India Chapter and the STC global community.

**BERKELEY**

**Linda Urban**

For sustained and exceptional contributions to the Berkeley Chapter’s leadership and programs and for furthering the technical communication profession in the Bay Area and beyond.

**CAROLINA**

**Rick S. Sapir**

In recognition of your exemplary efforts to assist the Carolina Chapter and your continuing contributions to our chapter activities.

**CHICAGO**

**Linda Jansak**

In recognition of your dedication to STC Chicago, your service on the STC Chicago Administrative council, and your commitment to the Chicago eLearning & Technology Showcase.
LONE STAR
Chris LaPorte
For sustained contributions to the Lone Star community—for your wisdom, experience, and sound advice.

LOS ANGELES
Li-At Ruttenberg
For providing enthusiastic leadership to the Los Angeles chapter in our 50th milestone year—and many miles thereafter.

MIDDLE TENNESSEE
Amy Oldham
In recognition of your selfless leadership, enthusiastic mentorship, and tireless dedication to the Middle Tennessee Chapter and its membership.

NEW MEXICO KACHINA
Jean Gabriel
For your dedicated service to the New Mexico Kachina Chapter from 2005 to 2009 in many roles, including Chapter Secretary and Webmaster, and for supporting the chapter as a competition judge, Job Bank Coordinator, and advisor to the 2009 Administrative Council.

NORTHEAST OHIO
Tricia Spayer
For continued exemplary service and dedication to the Northeast Ohio chapter and your many years of leadership on the NEO STC board.

ORLANDO
Mike Murray
For serving as an exemplar of how to lead effectively and how to mentor with love and inspiration, and for using Da Voice to inspire members to set and achieve lofty goals.

ROCHESTER
Lisa Moretto
For outstanding leadership of the Rochester Chapter, for introducing the Idea Market format to our chapter, for outstanding practice that inspires our members, and for generosity in sharing her time and expertise.

ROCKY MOUNTAIN
Ron Arne
For outstanding leadership of the Rocky Mountain Chapter, including ongoing contributions to the newsletter and website—for recruiting and mentoring new volunteers, and for your inspiration, enthusiasm, creativity, and dedication.

ROCKY MOUNTAIN
Jessica Betterly
For sustained contributions to the Rocky Mountain Chapter as our treasurer—for consistently sharing your knowledge and experience, and always providing sound advice with a smile.

ROCKY MOUNTAIN
Julie Bettis
For outstanding contributions as facilities and hospitality manager—for your constant encouragement and smiling face, deft project management skills, and the positive attitude you consistently exhibit while completing tasks for the Rocky Mountain Chapter.

SOUTHEASTERN MICHIGAN
Erin Moulton
For outstanding leadership of the Southeastern Michigan chapter and for continued service that exceeds expectations and requirements.

SOUTHWESTERN OHIO
Judith Harper
For your dedicated service to SWO-STC and the profession of technical communication.

SOUTHWESTERN ONTARIO
Lori Jankowski
For your calm professionalism, invaluable candour, and unwavering support of the Southwestern Ontario chapter, even in the face of great distances.

UNITED KINGDOM & IRELAND
Nick Rosenthal
For your dedication, experience, and leadership freely contributed to the United Kingdom and Ireland Chapter.

WILLAMETTE VALLEY
Carol L. Larson
For outstanding contributions, as coeditor, to the award-winning Willamette Galley, and for your tireless dedication and service to the Willamette Valley Chapter.

WILLAMETTE VALLEY
Maralee Sautter
For the passionate leadership, dedicated service, and sage advice you have provided to the Willamette Valley Chapter through your myriad elected and volunteer positions.

Distinguished SIG Service Awards

IN 2002, THE SOCIETY initiated a formal award program to recognize the commitment and hard work of members of its special interest groups (SIGs). The Distinguished SIG Service Award (DSSA) recognizes length of SIG membership, consistency of service over the duration of membership, and variety of service. Following are the winners of the 2010 Distinguished SIG Service Award and their official citations.

INSTRUCTIONAL DESIGN AND LEARNING
Carol Widstrand
In recognition of your continuous dedication and wholehearted support of existing and new IDL SIG activities.

TECHNICAL EDITING SIG
Rick Sapir
For your unfailing willingness to initiate and wholeheartedly support an innovative and successful web transformation for the SIG.
More Details on the “Class of 2010” Fellows and Associate Fellows

THE FEBRUARY ISSUE of Intercom announced the names of this year’s Fellows and Associate Fellows. Below we present the citations to further honor them. STC awards Associate Fellow to Senior Members who have attained distinction in the field of technical communication. The rank of STC Fellow is conferred upon Associate Fellows who have attained such eminence in the field of technical communication that the Board deems them worthy of being singled out as one of the select few who have distinguished the Society and the profession.

The new Fellows and Associate Fellows will be honored at STC’s 2010 Technical Communication Summit, 2–5 May 2010, in Dallas, TX. An honors banquet will be held on Tuesday, 4 May, from 7:30–11:00 PM. Tickets for the banquet and reception are $80 and can be purchased using the conference registration form online at http://conference.stc.org.

Congratulations to all the honorees!

FELLOWS

Phylise H. Banner
For her innovative work in the field of distance education and e-learning, especially her emphasis on excellence in information design.

Michelle Corbin
For championing technical editing as quality assurance, for continuously promoting and recognizing the value of technical editing in technical communication, and for successfully encouraging professionals to establish themselves as true technical editors.

David J. Dick
For his efforts as editor and assistant manager of the Usability & User Experience SIG, his leadership in founding the Belgium Chapter of STC, and his willingness to share his experience in judging newsletter and technical communications competitions.

Pamela S. Ecker
For her dedicated service to the Society’s educational programs through her presentations and work on the annual conferences, and for her dedication to students of technical communication.

Russell L. Friend
For his long and dedicated service to the Chicago chapter, including the establishment of Thursdays @ Chicago, and his dedication to the profession of technical communication through teaching and mentoring.

Barbara A. Giammona
For her mentorship, leadership, presentations, and research work, which led to an award-winning article in Technical Communication.

Ann-Marie Grissino
For her professional efforts in e-learning, as well as judging online entries in local, regional and international competitions.

Kristine Haugseth
For her outstanding work in the field of technical editing, both in practice and in teaching and mentoring others.

Alan Houser
For his superb presentations and work in electronic publishing, and leadership in STC international conferences.

Russell L. Kahn
For his long and dedicated service to students of technical communication, particularly for his work establishing degree programs at SUNY Institute of Technology.

Karen Lane
For her important contributions to the profession of technical communication through her excellent publications and for her continued work on the STC Summit.

Deanne Levander
For her continuing support of STC and the technical communication profession through chapter leadership roles, innovative website development, competitions support, STC international conference support, and student mentorship.

Sylvia A. Miller
For helping companies realize the value of technical communication, for advising and mentoring students, and for contributing to the success of the Southwest Ohio chapter and the Instructional Design and Learning SIG.

Jack Molisani
For his outstanding work in the technical communication profession
and for his prolific publications and presentations.

**Neil Perlin**
For his exceptional work in the profession of technical communication and willingness to share his expertise with others through his many publications and presentations.

**Kathryn Poe**
For her exceptional work in the profession of technical communication and for her impressive work with Agile and willingness to share information.

**Gloria A. Reece, EdD**
For her tireless dedication and research into programs benefiting the visually impaired, especially regarding specially designed websites, along with her STC efforts with the Instructional Design and Learning, AccessAbility, and Consulting and Independent Contracting SIGs.

**Thomas A. Reed**
For sustained contributions to the field of technical communication in both industry and academe, and for mentoring students and new professionals in the field.

**William C. Wiese**
For his exemplary work in technical communication and project management, and for his stalwart service to and astute fiscal management of the Society.

**Mona M. A. Albano**
For her outstanding service and dedication to the STC Toronto chapter as well as for being a role model in technical communication.

**Barrie Byron**
For advocating and supporting the field of technical communication, technical communicators, and the Society through a variety of media and dedicated hard work.

**Angela Dianetti**
For sharing best practices of technical communication, steady leadership, and continued devotion to the Northeast Ohio STC community.

**Taryn Light**
For her service, leadership, initiative, and vision in both the profession and in the Society, which are exceeded only by her unbounded caring for others. She is, and always will be, our guiding light.

**Nad Rosenberg**
For her exemplary knowledge of our field, her commitment to quality and professional excellence, and her sustained support of STC and the international credibility of technical communicators.

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WHEN YOU SUBMIT articles to Intercom, the editorial team works hard to ensure that your final article is as good as it can be. For some articles that come in, all that is required is some straightforward copyediting. For other articles, however, more extensive revisions are needed; sometimes, these revisions include significant content reduction so that an article will fit in its allocated space.

There are things that writers can do, though, to reduce the amount of rework and markup that has to occur after articles have been submitted. We’ve outlined some of them here:

Work Within the Word Count
The biggest help writers can provide for themselves and the magazine’s editors is to determine how long an article needs to be in order to properly cover the chosen topic. The feature articles within Intercom publish to the following word counts:

- Two published pages = 1,400 words
- Three published pages = 2,100 words
- Four published pages = 2,800 words

These total word counts include all of the following: body text, headings, figure captions, table titles and content, and author bio paragraphs. It’s also important to remember that every graphic in your article (e.g., screenshots, line drawings, flowcharts, and photos) subtracts approximately 175 words from your total word count. So, if you’re sending in an article that you intended to be two published pages, and it includes two screenshots or photos, your total word count actually needs to be 1,100 words—not 1,400 words.

Author bios must be 50 words or less and need to include an email address. Within reason, you can include any information you want about your STC activities, your business, publishing credits, or the basis for your expertise. Leave information about your hobbies or “passions” for your Facebook page or blog profile. Increasingly, authors are including URLs to their websites, blogs, or LinkedIn profiles; doing so reduces the size of the bios in an article and promotes traffic to authors’ online ventures.

Use Graphics Judiciously
When you work with technical manuals all day, you’re used to using graphics however often you need to. When you’re writing for a fixed, allotted space in Intercom, however, you need to exercise different judgment about which graphics you send to us. In tutorials in particular, you rarely can load as many graphics onto a magazine page as you can in a manual, an FAQ document, or a webpage—unless you want the final result to look like a poorly designed jigsaw puzzle.

Create a balance between your text and graphics, making sure that there’s enough text in the body of your article to support the visual weight of the graphics you want to use. If you’re using screenshots, pick...
Avoid Spacehogs
When you work in manuals and online help all day, you view things like headings and bulleted lists differently. You use them appropriately, whenever and wherever you need, without much concern about space. But in the tight quarters of a magazine page, three or four levels of headings, lots of bulleted lists, and overly chunky bullet list items decrease readability and chew up a lot of space, resulting in articles that overrun their allotted page count. Frequently, these are symptoms of writers who are trying to fit too much into one article. In these cases, we work with authors to substantially edit articles to remove third- and fourth-level headings, recast chunky bulleted lists into paragraphs with embedded subheads, modify other lists to reduce the page real estate they attempted to claim, and cut sections because they ultimately were outside the genuine scope of the article.

It’s understood by Intercom’s editors that for many of our members, writing for magazines is a new endeavor. They start from what they are familiar with, and try to figure out the rest as they go along. To that end, new writing guidelines have been posted to www.stc.org/intercom to help all Intercom contributors navigate their forays into magazine writing. We believe that not only will these guidelines help produce articles that the magazine will be proud to publish and the authors will be proud to include in their portfolios, but that they also will help you start developing a whole new set of marketable skills.
GIVEN TODAY’S RECESSION, most of us have to economize. Maybe your department can’t afford the greatest tools or won’t invest in the latest technology, but that’s life in a downturn. For simple illustrations, drawings, diagrams, and charts, you can certainly do good work with Microsoft Word’s drawing tools. In fact, you can create more effective graphics than Word’s critics are willing to give the program credit for.

I’ve been using Word’s drawing tools for years—mainly for e-learning storyboards—and have found that with a little experimentation and some understanding of how simple elements can be combined to make striking effects, I can do a pretty good job. (It also helps to have a bit of drawing skill.) The same tools for simple art and graphs available in Word can also be found in PowerPoint; if you’ve already been creating graphics in the latter, creating graphics in the former will not be a huge transition for you.

Figure 1 shows the basic Drawing toolbar. If you open Word and don’t see it, go to Toolbars under View and check Drawing. As you can see, the basic shapes and options are there—a box, lines, arrow, text box, and so on. We won’t be able to cover every icon in full in this column but we can cover the basics. We’ll focus on drawing basic diagrams or graph images. Word’s drawing tools are not suitable for creating illustrations beyond very simple items.

**Lines and Shapes**

In the toolbar there are a range of simple shapes—rectangle, ellipse, line, and arrow. In addition, there are several groups of AutoShapes.

Let’s draw a simple flowchart using the flowchart examples. Nothing too spectacular here but it works (see Figure 2). How did we build this?

The Start, Choice 1, and Choice 2 boxes are text boxes right off the toolbar. As soon as you select one of the choices, you will get a drawing cursor that allows you to drag the box dimension to the size you want. You can then start typing and the text will start filling the box. You have the usual text choices of font, point size, style, and color using the same formatting tools that you use for text in your document. I’ve made my box labels in 8 pt. Arial. The decision box (or diamond shape) comes from the Flowchart option in the AutoShapes menu. It is not a text box, so it won’t accept text input. So we need to combine our diamond with a text box. Now we’ll begin to see some of the power of
the drawing tools—combining primitive elements to make more complex compositions.

To do what we need here, use the Format Text Box dialog box. Just click on your text box’s border. To integrate our diamond decision block with a text label, we eliminate the border around the text box. Select Line|Color, then select No Line. Notice that the No Fill option is the default for the Fill|Color block. This means that the area of the text box is transparent. In some versions of Word that may not be the default, so for our labeled decision block to work, we’d have to select No Fill for the text box. Otherwise it’s likely that some of the fill will block out parts of the diamond.

**Combining Many Elements**

The secret to getting the most benefit from drawing tools is combining elements. Fast forward to a storyboarded game idea for a computer-based training (CBT) course on air pollution that I did several years ago.

Figure 3 is a Word drawing from a storyboard, depicting a proposed learning game about the effects of the sizes of particulate matter on penetration into the lung tissues. The user could pick a concentration and type, then click Take a Breath. The arrow would point to the depth of penetration from Generation 0 to 32. Everything was drawn with the Word tools except the lung, which was from stock clip art.

Probably the most powerful tool used here is the Fill tool for shapes. Any shape, whether drawn free-form such as the air mass and the parts of the bellows or a box, can have a wide choice of fill options. I’ll cover just a few of the basics.

Fill Effects is one of the most powerful tools in the Draw arsenal, allowing you to set transparency of the fill and to combine colors in what is called a gradient—meaning one color blending into another. This gradient tool is one of Word’s best-kept little secrets. It’s easily as powerful as similar tools in more well-known graphics software such as Flash or Photoshop. The combination of varying transparency and virtually infinite choices of colors to blend allows such effects as glare or reflectivity and various kinds of 3-D effects and layering. A simple example of these can be seen in the Take a Breath button in Figure 3, which was created with options in the Gradient tab of the Fill Effects tool window. The Texture tab offers another feature: filling your standard or free-form shape with one of many texture choices such as fabric, wood, marble, and several others.

**Other Effects**

**3-D.** There’s a 3-D tool on the far right of the drawing toolbar (see Figure 1). For any shape, you can click that icon and get a choice of 3-D effects. The Pollution Source box in Figure 3 is merely a rectangle combining some transparency and a 3-D effect.

**Rotation.** Any shape can be manipulated in orientation as well. At the left end of the Drawing toolbar, the Draw menu offers these options (see Figure 1). Select any draw object (such as a box, line, text box, or auto-shape).

In the Rotate and Flip option you get the choice of free rotation (Word will give you a little green handle that you can drag with the mouse), plus some fixed rotation choices.

**Free-form Objects.** The drawing in Figure 3 makes use of the free-form drawing tools.

To make a free-form shape, select AutoShapes from the Drawing toolbar and then select Lines. You get a choice of six line types. The lower set allows you to draw enclosed objects such as polygons or spline-curved objects (such as the air mass in Figure 3). What’s great about this is that the Fill and Orientation features apply just as well to free-form objects as to the fixed shapes.

This should give you a feel for the range of tools available in Word Draw. Of course there is far more here than I was able to cover. But I’d like you to take away the sense that the developers at Microsoft have provided a fairly sophisticated art and graph tool with some really advanced features for creating effective, immersive graphics—some of which actually exceed some of the features in so-called professional drawing packages. Enjoy!

Marc Lee (marc@mlmultimedia.com) is owner of MLMultimedia, a multimedia and e-learning consultancy. Marc has been a member of the Rocky Mountain Chapter for about 20 years and was chapter president from 2004 to 2005. Marc has a PhD in English from the University of Wisconsin-Milwaukee.

**Figure 2. Simple Chart**

**Figure 3. Drawing Combining Word Draw Features**
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9% Page 10
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DAISY books differ from audiobooks because these digital books offer navigation and searching capabilities. Users can move through a book by searching for words, paragraphs, or page numbers. As the DAISY Consortium says, “A traditional talking book is an analog representation of a print publication. A Digital Talking Book (DTB) is a multimedia representation of a print publication” (DAISY Consortium, 2010).

A variety of digital book readers are available to consumers, including the Sony Reader, Amazon Kindle, and Apple iPhone to name a few. Amazon’s Kindle 2.0 (introduced in 2009) offers some accessibility features. The Kindle 2.0 allows the reader to choose from up to seven font sizes. It also has a read-aloud function, which might be enabled for the book. This function is only available, however, if a book publisher has given permission for it to be enabled.

Even though the Kindle has these accessibility features, it is still missing a few key items. Universities that have tried to go completely bookless and adopt the Kindle as the delivery mechanism for all textbooks for their students have found this out the hard way. Even though many of the books can be read aloud, the navigation system to select a book can’t be accessed by voice controls. This means that a person who is blind has no way of knowing which book to select, is unable to access any other menu options, and is unable to access the store. These people, therefore, would need assistance from another person to get the book selected and started.

Amazon has announced, however, that a future version of the Kindle will have a set of audible menus, plus an extra-large font for people with diminished visual acuity.

REFERENCES


SUGGESTED READINGS


Mark Your Calendar
Organization events across the globe

FYI lists information about non-profit ventures only. Please send information to intercom@stc.org. For STC’s complete calendar of events, visit www.stc.org/edu/relatedEvents01.asp.

1. **2–5 May 2010**
The Society for Technical Communication (STC) will hold its 57th Technical Communication Summit at the Hyatt Regency Dallas in Dallas, TX. For more information, contact:
Lloyd Tucker
+1 (571) 366-1904
lloyd.tucker@stc.org
http://conference.stc.org

2. **13–15 May 2010**
The American Society for Indexing (ASI) will be holding its annual conference in Minneapolis, MN. For more information, contact:
ASI conference@asindexing.org
www.asindexing.org/site/conferences/conf2010/index.shtml

3. **14–18 May 2010**
The Council of Science Editors (CSE) will hold its annual meeting, “The Changing Climate of Scientific Publishing—The Heat Is On,” in Atlanta, GA. For more information, contact:
CSE
+1 (703) 437-4377
councilscienceeditors.org/events/annualmeeting10/index.cfm

4. **16–19 May 2010**
The American Society for Training and Development (ASTD) will hold the 2010 International Conference & Exposition in Chicago, IL. For more information, contact:
ASTD
+1 (703) 683-8100
www.astdconference.org

5. **19–22 May 2010**
The 4th International Maastricht-Lodz Duo Colloquium on “Translation and Meaning” will take place in Maastricht, the Netherlands. For details, contact:
Dr. Marcel Thelen
+31 43 346 6471
m.m.g.j.thelen@hszuyd.nl
www.translation-and-meaning.nl

6. **24–28 May 2010**
The Usability Professionals Association (UPA) will hold its 2010 international conference, “Embracing Cultural Diversity—User Experience Design for the World,” in Munich, Germany, at the Bayerischer Hof Hotel. For more information, contact:
Nicole Tafoya
+1 (630) 980-4997
Chair2010@usabilityprofessionals.org

7. **24–28 May 2010**
The International Terminology Summer School (TSS 2010) will take place at the University of Vienna in Vienna, Austria, jointly organized by TermNet, the International Network for Terminology, and the Center for Translation Studies. For more information:
TermNet
+43 1 23060 3965
events@termnet.org
www.termnet.org/english/events/ss_2010/index.php

8. **1–4 June 2010**
Join the Association of Proposal Management Professionals for the 21st Annual APMP International Conference and Exhibits at the Walt Disney World Dolphin in Orlando, FL. The focus of the event is “Going Green: A Global Initiative—All Things Considered.” For details, visit www.apmp.org/ca-29.aspx

9. **2–4 June 2010**
The Society for Scholarly Publishing will hold its 32nd Annual Meeting in San Francisco, CA, at the Hilton San Francisco. For more information, contact:
+1 (303) 422-3914
info@ SSPnet.org
www.sspnet.org/Events/spage.aspx

10. **7–9 July 2010**
The Professional Communication Society (PCS) of the Institute of Electrical and Electronic Engineers (IEEE) will hold its 2010 Professional Communication Conference at the University of Twente in Enschede, the Netherlands. For more information, contact:
PCS

11. **17–19 Aug. 2010**
The International Society of Logistics (SOLE) will hold its 45th Annual International Logistics Conference and Exhibition, themed “Global Logistics Sustainability,” 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

12. **27 Sept.–1 Oct. 2010**
The Human Factors and Ergonomics Society (HFES) will hold its 54th annual meeting at the Hyatt Regency San Francisco in San Francisco, CA. For more information, contact:
HFES
+1 (310) 394-1811
info@hfes.org
www.hfes.org/web/

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Clarity and Conciseness in Business Communication

BY GLENN B. FATZINGER | Member

TODAY’S WORKERS ARE overwhelmed with information, so effective employees must write short, clear, concise correspondence in plain English to capture the attention of very busy people.

Business communication has improved greatly in the past 100 years since the advent of the typewriter. From the Corona (America’s first portable typewriter in 1906) to today’s high-tech laptop (see photo), early typewriters forced the use of correct spelling, punctuation, layout, and orderliness, and enhanced a mechanical orientation of users. The overall result was permanent and accurate business records.

How has teaching business writing and speaking changed in the past 15 years since I began teaching the subject at Marymount University in Arlington, VA? In the mid-1990s, hard-copy memos and letters still dominated office correspondence. Hard-copy letters are still used today for more formal business communication, although email now dominates business communication. I still teach fundamentals of business writing concepts using hard-copy correspondence because the key concepts also apply to email.

I use a 3x3 systems writing process described in Mary Ellen Guffey’s Business Communication, Process and Product, a book that can be used for both writing and business presentations. Phase 1 of the process requires analyzing the audience as the first step, then anticipating the audience’s reaction, and finally adapting the message to the audience. Phase 2 involves researching background information and organizing it into an outline (bad organization is a major writing problem), and composing a draft message. Phase 3 involves revising the message for clarity and correctness, proofreading it, and evaluating it for effectiveness.

Has email improved business writing in recent years? Email has its advantages and disadvantages. It has improved the quality of business communication and customer service and reduced business costs. David Shenk’s book, Data Smog, highlights some of the disadvantages: email is growing at a rate of 60 percent annually, but 40 percent of email is of low or no value. White-collar workers are drowning in information from the ease of email communication; they send over 200 email messages a day, according to a Pitney-Bowes Inc. and Institute for the Future report.

Today’s challenge is how to reduce and effectively use information, so I must teach future employees to write to the point in plain English and manage large amounts of information. In addition to teaching concepts of good writing, I also focus on teaching attractive formatting and layout because of the information overload problem. Well-written documents are more likely to be read and improve your image in the workplace.

Both email and hard-copy routing memos should have four parts: a precise subject line that summarizes the message, an opening that immediately reveals the main idea, a body that briefly explains one topic in detail using well-organized bullets or lists, and a closing with action information that has dates and deadlines or a summary of the information discussed in the body.

Today, I also emphasize the importance of good team presentation skills more than I did 15 years ago. The feedback from business leaders indicates that employees must be able to give short presentations, often in teams, to colleagues, supervisors, and subordinates if they are to advance in their careers.

My Marymount students must give two 20-minute PowerPoint team presentations (one ethics case and one corporate business case), and the class formally critiques each presentation based on the criteria of covering the content of the case as well as the delivery technique of each team member.

Marymount business students are expected to enter the business world as effective communicators. As Jack E. Appleman, president of SG Communication stated, “For thousands of workers who find themselves faced with new assignments, more responsibilities, and too little time to worry about communication skills, the ability to write and communicate in a clear and concise fashion is essential. Employees need to deliver information quickly and accurately to a wide array of audiences. That’s what separates good companies from great companies.”

My job is to ensure that our Marymount graduates are equipped with effective business writing and oral presentation skills to function in those great companies.

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