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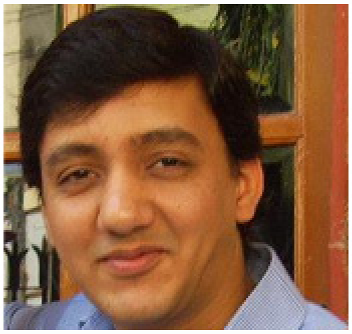

This column is written by [Rahul Prabhakar](), a leading member of the technical writing community in India. Rahul is employed as a senior technical communicator with Samsung Electronics Company Limited in South Korea. He has spearheaded several initiatives to elevate the profession in the Indian subcontinent. Rahul has a Bachelors of Technology degree in Electrical Engineering and a Diploma in Advertising Management. You are free to send your comments, feedback, or suggestions for his column to rahulprabhakar@msn.com.

FROM THE EDITOR'S DESK

South Korea Beckons: Global Awareness and Cultural Sensitivity Strategies for Western Technical Communicators

For the past four years, I've lived outside India. Being an expatriate has given me a unique perspective; it has made me more responsive toward the issues of global awareness and cultural sensitivity. More importantly, working as a technical communicator in East Asia has rewarded me with firsthand experience of the cultural differences and their implications on both my professional and personal life. Through this article, I'd like to share my experiences—good and bad—with Western technical communicators, about what it's like to work for a Korean company.

Overcoming Cultural Pangs

As an expatriate in Korea, it took me just one week to realize how different Korean culture is compared to Indian culture. The Japanese occupation and the war with North Korea have left footprints on modern Korean culture.

The traditional values in South Korea stem from deep-rooted Confucian ideology. Confucianism or "The School of the Scholars" revolves around social, political, philosophical, ethical, and religious thoughts that have influenced the culture and history of South Korea up to the 21st century. Nowhere is this more evident than in Korea's corporate system.

FROM THE EDITOR'S DESK

Learning to Appreciate a Different Culture

As more and more workplaces become multicultural, there's a great sense of appreciation and respect toward employees from different countries, cultural backgrounds, or ethnicities. Take South Korean conglomerates like Samsung, for instance, where the concept of "global" employees has become quite popular. At Samsung, you're more likely to meet contract employees from India, China, Russia, Ukraine, Japan, Germany, America, France, Turkey, Philippines, and Belarus.

Technical communication also requires sensitivity to diverse cultures. As professional technical communicators, we need to be more aware of cultural differences. By considering the cultural makeup of our audience, we can cater to their needs, without inadvertently causing any embarrassment or resentment.

Differentiating Between High-context and Low-context Cultures

If you're writing for high-context cultures, such as Korea, Japan, China, or France, which assume that readers of technical documents should have enough knowledge about the subject before they begin reading, focus on the amount of detail you need to provide. Generally, technical documentation from high-context cultures offers little detail or explanation.

On the other hand, writers in low-context cultures, such as the United States, India, United Kingdom, or Germany, are expected to provide more detail in technical documents, since it is assumed that their readers know very little or nothing about the subject. Unsurprisingly, technical documentation from low-context cultures is far more comprehensive and elaborate than technical documentation from high-context cultures.

Knowing how much information to provide in a particular culture helps writers communicate more effectively. By considering the cultural background of your audience, you won't overwhelm them with too much information (in high-context cultures) or too little information (in low-context cultures).

Respecting the Hierarchy

In every culture, unwritten rules govern many interactions. Understanding these rules can help you succeed in that culture.

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Confucianism has introduced a structure of hierarchy, rather than a matrix, in most Korean organizations. Professionals are hired on merit, in tandem with social considerations. School affiliation and age play a major role in most hiring decisions in Korea.

Koreans place a lot of emphasis on title; it could be said that nowhere in East Asia does title hold more prominence than in Korea. Try addressing a Korean colleague of the same age group but higher designation with his name, and chances are you'll be asked to prefix a title. If you don't use a title to address someone higher in the value chain, Koreans are likely to consider you disrespectful or discourteous.

If the distance between top- and bottom-level organizational hierarchies is wide, technical communicators should resort to formal communication. If the culture encourages a flat organization, the communication automatically becomes less formal.

In order to succeed in a Korean company, you must consider the hierarchy between you and the final decision maker. Allow everybody in the middle to give their opinion and be included as much as possible.

Some Differences Between Korean and Western Workplaces

- According to an in-depth analysis of the "2004 Time Use Survey," South Koreans spend more time at work than Westerners. Most Korean managers throw a fit each time a subordinate enters the premises late, even by a minute. Koreans are sticklers for punctuality, and most jobs vary from 30 to 40 hours a week, but you'll always be encouraged to spend more time at work. If you're interested in working in Korea, and you're accustomed to flex time and telecommuting, be prepared to make some major adjustments to your lifestyle.

- In most East Asian nations, cultures tend to be collectivist. In other words, people pursue group objectives and respond to the groups' needs. But again, several Western countries propagate individualistic culture, where personal achievement holds more prominence than other things. If you know your audience and their cultural orientation, choosing between "me-oriented" or "we-oriented" writing shouldn't take long.

- People in East Asian countries—mostly Korea and Japan—prefer indirect modes of communication to direct modes of communication. Countries like the United States, India, and Canada typically prefer direct communication. Each approach has its advantages and disadvantages.

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- Koreans tend to shy away from Westerners who are loud, direct, or candid in any form of expression. In the Western world, it might be okay to ask questions, such as age and rank. However, in this part of the world, it's considered inappropriate to ask many questions during meetings or conference calls. If you sit quietly and absorb everything that's thrown at you, you'll probably fare better than someone who doesn't. People in East Asian cultures also generally do not contradict their supervisors or seniors as a point of respect.

New Field, Greater Challenges

Technical communication is a new and emerging field in South Korea—not many Koreans consider it to be a separate profession or a true academic discipline. In fact, very few know what we do and confuse technical communication with advertising, journalism, translation, or technical marketing.

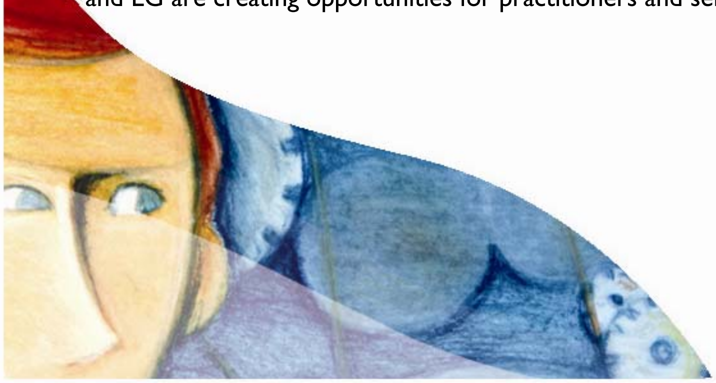
In an exclusive interview with JoongAng Daily, a leading South Korean newspaper, Sohn Eun-rag, deputy director of the policy department at the National Statistical Office, stated that out of 1,414 job categories listed with the Korean government, "technical writer" was still classified under "translator," implying that technical communication in Korea continues to remain unrecognized as a government-designated job. There could be many factors attributing to this, says Sohn, who feels that the field is relatively new—with only a limited number of technical communication practitioners, academicians, or service providers.

Changing the current scheme of things requires a gigantic effort and a fair bit of evangelism. Lack of proper technical communication education or training in Korea only makes it harder to cover enough ground. But on the bright side, less awareness about our profession also means that the market is ripe for exploration.

According to Chang Seok-jin, director of the Korea Technical Communications Association (KTCA), the product liability law passed in 2002 brought about a paradigm shift in the way Korean companies look at user manuals. Under the law, if a Korean company was found responsible for financial or physical damage as a result of its badly written instruction manuals, it could be booked for legal punishment.

More Opportunities for Practitioners, Service Providers, and Academicians

As technical communication tries to establish a foot-in-the-door here, big Korean companies like Samsung, Hyundai, and LG are creating opportunities for practitioners and service providers from foreign countries, inviting them to



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experience, and be a part of their multifaceted culture.

A typical "work profile" for technical communicators in such companies will include writing such things as reports, business letters/memos, instruction manuals, sales and marketing materials, data sheets, proposals, e-communication, and translation materials.

Also, premier Korean universities are now inviting outstanding international scholars and academicians, mostly from native English-speaking nations, to teach technical communication. For instance, the College of Engineering at Seoul National University (SNU) is planning to start a full-time degree course in engineering general and convergence technology, which includes technical writing as one of its main subjects. SNU sees two distinct advantages with such an arrangement—first, it will promote diversity of its faculty, student body, and curriculum; and second, it will beef up its position on the global map.

The University of Science and Technology (UST), a group of public universities and research institutions located in Seoul, Suwon, Seongnam, and Daejeon, provides special courses in technical communication and technical writing. Ewha Woman's University also offers a master's degree in professional writing and technical communication.
For miscellaneous short-term programs, visit the Korean Advanced Institute of Science and Technology (KAIST), which has a five-week intensive summer program to provide communicative practice in English.

How Technical Documents Are Written in Korea

Korean companies don't understand why technical communication is important. For them, it's always an afterthought or an additional burden. The result is, more often than not, poor quality documentation that smacks of inaccuracies and inconsistencies.

What surprised me when I started to work for Samsung was that some business units (BUs) recruited floor secretaries to write and format their user manuals in English. Other BUs relied on their internal resources (such as subject matter experts, programmers, design engineers, field application engineers, supervisors and managers, public relations officers, sales and marketing staff, and IT specialists) to write or structure technical documents.

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None of these people had real-life exposure to technical communication in their previous roles; also, they weren't obliged by management to take up formal education or training in technical communication.

Among the most valuable and frequently used resources of Korean writers are digital and online dictionaries and thesauri, translation tools like Hunmin JungUm Global, and guidelines and standards documents for specific industries. Legacy documents are quite popular, too, as are technical documents from peer companies and subject-matter consultants.

Problem Areas

There are no technical publication departments or content business groups per se in most Korean organizations. Additionally, Korean companies lack the experience in setting up technical publication departments. The biggest surprise, however, is the absence of any accurate terminology for technical communication in Korean.

Companies here rarely focus on maintaining standard workflow processes, and they hardly use technology or tools for sharing critical information. Even Korean employees don't share information frequently—if someone leaves the organization, they take the information along with them.

In the past, Korean companies have been on the receiving end of customer wrath due to poorly produced user documentation. Current technical documents do not meet users' satisfaction either, and there are immediate problem areas that need to be addressed.

Most Korean technical writers have never lived in an English-speaking country, and they are used to writing long and unwieldy sentences, laced with grammatical mistakes, colloquialisms, and formatting issues. Making improvements and reducing the cost of creating, editing, and managing content has now become a critical strategy—something that did not exist in Korean organizations in the past.

Some of the bigger problems that continue to haunt the technical communication industry in Korea include: a lack of professional technical communication training on tools and the English language; the inability to hire local/foreign

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technical communication practitioners who are "right" for the job; few company-/enterprise-level style guides and prescribed patterns, templates, and standard formats to follow; inadequate ethical considerations; and a lack of usability testing.

Also, considerable inconsistencies exist between the writers' criteria and the users' standards of what comprises an effective document. The biggest discrepancy lies in honesty—there's no such thing as copyright in Korea, or if there is, most Korean writers and managers are blind to it. Over the years, the need to hire foreign technical communication practitioners has increased tremendously in Korea. Several factors that have fueled this demand, including globalization, customers who discovered inconsistencies in technical documents, difficulties with translation, and issues with comprehension.

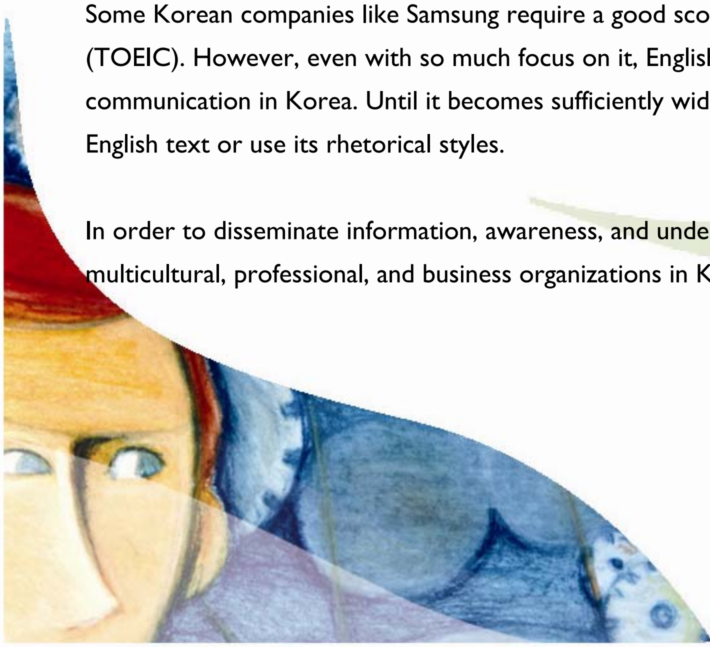
The Role of STC and the Technical Communicator Network

Before we start analyzing the role of the Society for Technical Communication (STC) and Korea's Technical Communicator Network (TCN) in elevating the technical communication profession, it's important to understand how Koreans view the English language in general.

Previous studies on the English language may not have centered on writing, let alone technical writing. Almost all Koreans start learning English—both in its written and spoken variants—from as early as the third grade. They are adept at reading English; what they truly lack is the chance to practice speaking it with a native. And while written English is required for university graduation and for attaining employment with big companies in Korea, no one learns to write well.

Some Korean companies like Samsung require a good score in Test of English for International Communication (TOEIC). However, even with so much focus on it, English has failed to become the preferred language for communication in Korea. Until it becomes sufficiently widespread, Koreans are unlikely to communicate in native English text or use its rhetorical styles.

In order to disseminate information, awareness, and understanding of the technical communication profession in multicultural, professional, and business organizations in Korea, STC started a Korea Chapter in 2006, which currently



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has 21 members. In addition to the STC Korea Chapter, technical communicators in Korea can collaborate via Technical Communicator Network (TCN), a relatively unknown entity in Korea with more than 550 registered members. According to Mr. Yoon G. Won, president of TCN Korea, these numbers are going to increase in the coming years.

What Lies Ahead

The profession of technical communication will eventually grow in Korea, but it will take a long time for the profession to fully realize its social responsibilities. In the meantime, technical communicators eager to work in Korea must understand the social, cultural, economic, and political environments in which Korean companies operate.

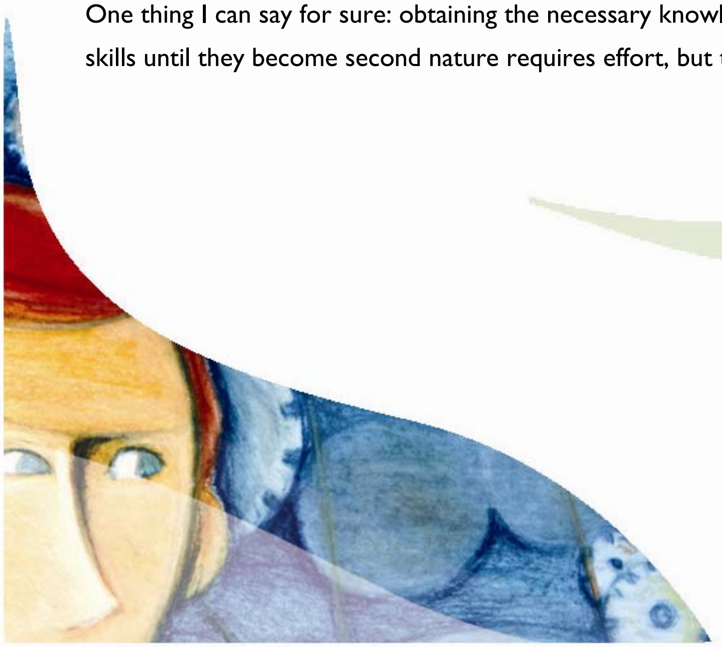
Academicians should focus on developing students' knowledge and competencies in the use of English language for intercultural communication in business and professional contexts. By opening new university-level programs, they would help technical communication become the most sought after profession in Korea.

Practitioners should also learn the customs and the language of another culture. For instance, without sufficient knowledge of written and spoken Korean, foreign writers will always remain ill-equipped to explore the manner in which Koreans write about technology in their own language.

Finally, my recommendation for dealing with intercultural issues is to have an open mind and heart. While we are all unique in some ways, at the core we're all the same. Our values, goals, and daily issues are pretty much the same. We might exercise different practices and customs, but they all fulfill the same basic needs or desires.

One thing I can say for sure: obtaining the necessary knowledge and skills to survive in a culture and practicing those skills until they become second nature requires effort, but the rewards are both heartwarming and dramatic.

~ Rahul Prabhakar



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This article is written by Suzi Magill. Suzi has a M.A. in English and Technical Communication from Youngstown State University. She was a technical communicator for Cognos, an IBM company and is currently the team leader for the technical documentation department of Thomson Reuters. You can contact her at suzimagill@gmail.com.

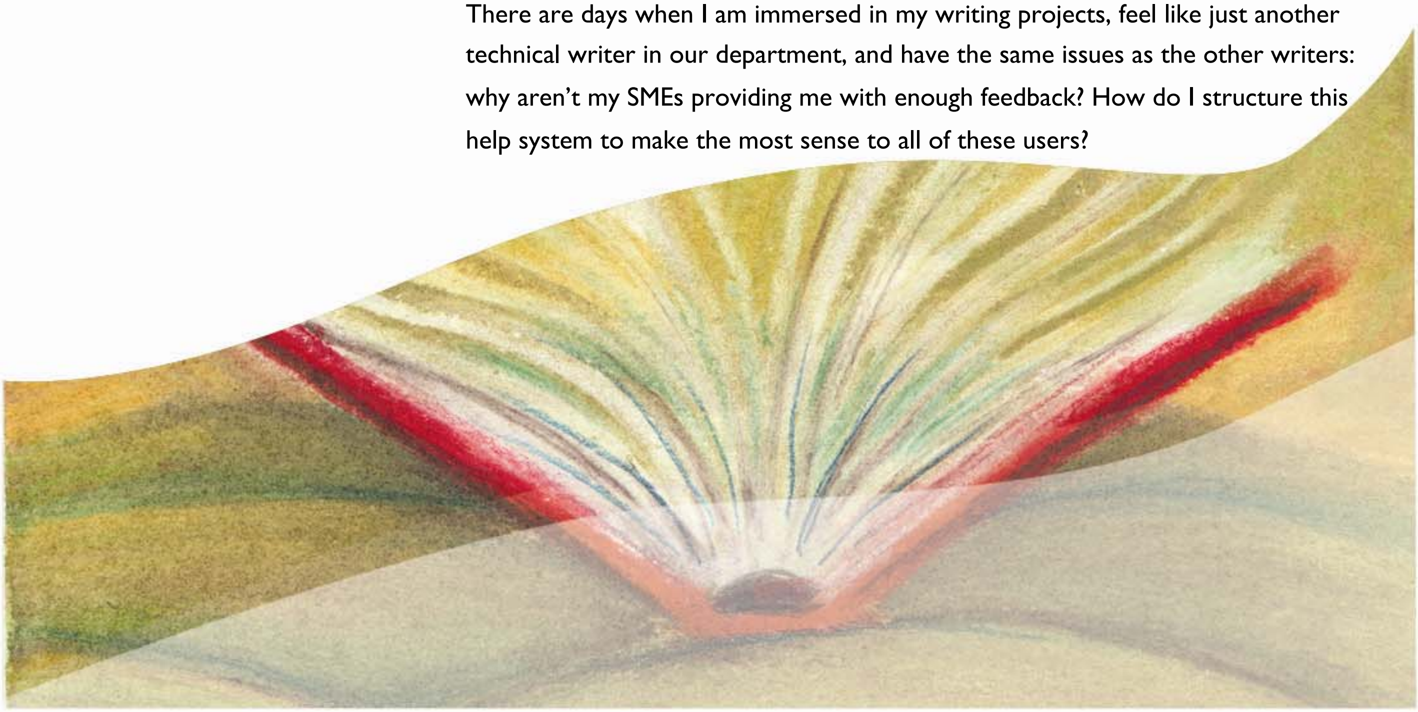
IN FOCUS

Walking a Tight Rope: Being a Team Leader and a Writer Can Be a Circus Act

Working as a team leader of a technical writing team is like walking a tight rope on a daily basis. I manage the workload of several other technical writers while managing my own documentation projects. I manage the production budget, assign writing projects, complete performance reviews, as well as write user guides, online help, and meet insane deadlines just like the other writers. So, I wear two "hats" within our department and those roles can sometimes become cloudy and confusing.

I work for a global information systems company as a team leader for the technical documentation department. I manage the workload, budget, performance, and compensation aspects of four seasoned technical writers. I also write user guides, online help systems, and knowledge-base articles for several Web applications. On top of that, I work on several initiatives within our business unit to expand our reach across the global organization using our intranet, social media tools, and by sharing content across several help systems.

There are days when I am immersed in my writing projects, feel like just another technical writer in our department, and have the same issues as the other writers: why aren't my SMEs providing me with enough feedback? How do I structure this help system to make the most sense to all of these users?



IN FOCUS

The list goes on, just like it does for any other writer. My situation is different, because in addition, I am also thinking about the performance reviews I need to complete, the computer equipment I need to order, and which writer will have enough bandwidth to work on documenting a new Web application.

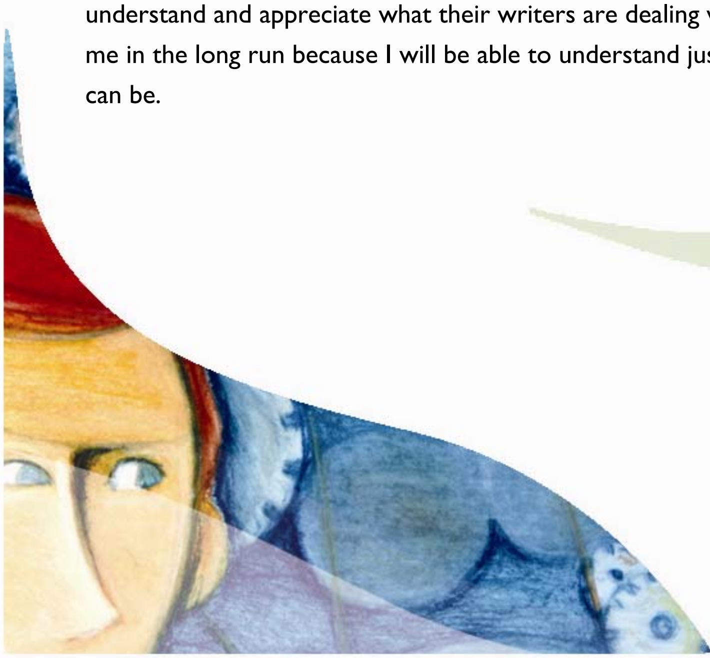
Being a team leader means I have to juggle two different roles on a daily basis. Does this make me a better writer or better manager? I say both. And sometimes, neither.

There are times when I think that as a team leader I am more attuned to what my writer's needs are. I can sense when they are overloaded simply because I am probably just as overloaded as well. I know what issues they are dealing with because I am most likely dealing with them too. I also think this perspective gives me a broader view of the position and it helps me push for process changes or equipment upgrades that I know will benefit the writer. I have a unique perspective that another documentation manager may not have because my role is not to solely manage these writers, but to be a writer as well. I form opinions and make decisions about issues within my group based on my own experiences as a current writer. I think that helps me make better, well-rounded decisions.

There are times, however, that my role can cloud my judgment a bit. It's easy to forget that I am a manager and not part of "the gang". When I first started, I had a hard time separating my desire to get to know the writers more on a personal level and my role as their manager. I couldn't ask the questions I normally would and I couldn't participate in the fun discussions about last night's reality TV episodes. I suppose I could, but I have to be cautious about what I say or do. I think it's important that I act like their manager instead of one of the gang. I don't think they would respect me as much if I acted like I was just another writer in the group.

I am thankful that my first management experience was in this role. I think it's important that new managers understand and appreciate what their writers are dealing with on a day-to-day basis. I think this experience will benefit me in the long run because I will be able to understand just how complex and delicate the writer/manager relationship can be.

~ Suzi Magill



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This article is written by Rahel Anne Bailie. Rahel provides content strategies for business impact for clients who care about content as corporate assets. This includes the architecture, interaction, and usability of text, visuals, and other intentionally designed elements on websites and web apps. She operates Intentional Design Inc., a Vancouver, BC, Canada consultancy focused on the sweet spot where content management, content development, and user experience meet. She can be reached at rabailie@intentionaldesign.ca.

TOOLS

The Human Side of Adopting Content Management

When we think about the adoption of a content management system within an organization, our minds often jump to the technology aspects: which system would be implemented? What other tools would we use? How would they work, and will we get training?

Implementing content management is generally cost justified as a way of benefiting the end users, in terms of satisfaction, because of improvements to the content quality, and to the organization, leading to cost savings or increased profits. The aspect that is often overlooked is its impact on the internal users—the staff expected to actually use the system day in and day out. This is the group that is most affected by the implementation, and the success of the implementation absolutely depends on their successful adoption of the system.

Any content management consultant has a horror story or two about resistance to, or even outright sabotage of, a content management implementation. System non-adoption or non-adherence costs the organization in several ways: loss of time, loss of content accuracy, and ultimately loss of the very efficiency that the system was put in place to address. That can translate into lost hours, lost productivity, and, in organizations sensitive to the possibility of potential lawsuits arising from content irregularities, an increased risk factor.

However, the idea that users will simply adopt a technology implementation is idealistic and naive. Cognitive psychologists estimate that roughly 20% of the population handles change well; the other 80% dislikes it. In the case of technical communicators, a recent survey showed that the statistics were even higher: one in four writers couldn't make the change from contextual or linear writing to topic-based content creation.

This doesn't necessarily mean that the 20% to 25% who find the transition challenging will become redundant in an organization, but it does mean that a skills re-assessment should be undertaken by a professional who can help with the department re-organization that plays to staff strengths in the new reality. There will be the need for an XSL developer, a department editor who will be the keeper of the style guide and "consistency cop".

To put the change into context, for technical communicators the keyboard is like a paintbrush, and the tool the canvas used to fix the words and images into place as part of the bigger picture. When writers, for instance, know a tool extremely well, they can devote 90% of their cognitive load to the thought process behind writing, with the other 10% working in the background at the task processing - keystrokes, pointing and clicking, dragging and dropping - without really being aware of what commands are being invoked, because it's so mundane. When a new system is implemented, during the adjustment period, the world changes. For the initial period, a large proportion of brain power now becomes devoted to the task processing, as the writers have to remember the new business processes, the new paradigm within the application, and the new keystroke combinations that go with them. This reduces the amount of cognitive load left for the higher-level thought processing. Instead of the previous 90:10 ratio, it could drop to 20:80 the first week, 25:75 the second week, 50:50 the third week, and so on, until the writers feel comfortable with the new system and have internalized the new system. The speed with which staff can return to a 90:10 is critical to their feeling of well being, and that depends on how well the change management process has been implemented. The better the process, the less the resistance to adoption; the less the resistance to adoption, the higher the acceptance rate.

After all, it is human nature to take the path of least resistance, and when an application puts barriers in the way of accomplishing a task, a user is likely to fall back on tried-and-tested ways as the means to a speedy end. When a naturalistic system is presented, i.e., the system is made to work in a way more natural to humans, users are far more likely to adopt the system. I've watched users, particularly when under pressure to get something done "right now" or by quitting time on Friday, to bypass technology with system-based processes, in the interest of expediency.

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TOOLS

They may even intend to redo their little shortcuts “the right way” when they return Monday morning, but of course, by the time Monday rolls around, they’ve either forgotten or gotten caught up in work-a-day pressures that de-prioritize the correction of a process they see as inherently broken.

Putting effort into the change management aspect of a CMS goes beyond the obvious need for driving efficiency and accuracy. It says that you value your internal users enough to ensure that they have a system that works for them. This creates a win-win situation, and that goes a long way towards system adoption in the workplace.

~ Rahel Anne Bailie

“Putting effort into the change management aspect of a CMS goes beyond the obvious need for driving efficiency and accuracy.”

Advice for the New Manager

This article is written by Gordon McLean. Gordon has been working in the software industry for over 14 years, and is currently managing a team of technical writers in an Agile environment. He firmly believes that technical communication can, and should be, a keystone in any organization and works hard to make that a reality. He can be reached at gordon@gordonmclean.co.uk.

First things first, make yourself a coffee. In all seriousness, fitting into the culture of your office and colleagues is crucial, and one of the best places to get a handle on that is the approach to coffee/drink breaks.

Then, all you need to worry about is understanding the process your company and team follow. Are you based in a waterfall type system? Are you Agile? And regardless of the underlying methodologies, how do things actually happen? Simple, right? Well it can take a little investigation but it certainly shouldn't be difficult.

Briefly I'd tackle things in the following order:

1. Talk to the members of your team
2. Talk to the people who set the expectations for your team
3. Audit your content (high-level for now)
4. Manage expectations

If you are joining an existing team of writers, I'd suggest that one of the first activities should be to sit down with them, one by one, and try and understand how they work, what issues they are facing, and what expectations they have of you and of their colleagues on a day-to-day basis. From this, you should get an understanding of their process, how they go about creating the information, how editorial and technical reviews are handled, and how that information is published.

DIRECTIONS

Collate all the responses; you'll revisit them later, although I would take any personal or specific issues to one side and deal with them accordingly.

Next up, I'd get a handle on the expectations being set on your team, which will include talking to other departments, and having a good understanding of why that expectation is in place. In case there are unknown expectations on your team, make sure you understand what they are and if they are valid.

Then I would certainly tackle a high-level content audit. Understanding the content you have and learning what the audience of that content requires goes a long way in helping you understand the working practices and decisions made in the past. It should allow you to see if writing style guides are being followed, and whether an editorial review process is working. It won't help with the technical review phase, though, but there are things you can do in that respect as well.

To me, a high-level content audit asks the big questions, why does the document exist? Why is the content of the document structured the way it is? Look at the content.

So far you've talked to the people in your team who create the content, you've understood the expectations they have, and the expectations on them. You know what type of content is being produced, why it exists, and have a good idea of what it contains and how it is produced.

Now the tricky bit.

Does the process that the rest of the company thinks you are following (their expectations) match with the process your team is following? If it does, great. If it doesn't, then this is the first thing you need to address with your team.

Rather than try and fix things yourself, get your team together in a room and tell them what you've discovered. This is not an exercise in 'why aren't you…' this is the beginning of a collaborative venture, so make sure you pitch it accordingly. What you need to get from your team is the real reason why the expectations don't match.

"To me, a high-level content audit asks the big questions, why does the document exist? Why is the content of the document structured the way it is? Look at the content."

DIRECTIONS

From their side it may be that they were unaware of some of those external expectations, or it may be that whilst the expectation is valid, the team hasn't been able to progress to that part of the process as much as they would've liked to.

Once you have completed that exercise and understood the position of your team (this is important), and your team has a common picture and understood position and process, you can revisit the expectations being placed on your team. It may ultimately mean you need one meeting with representatives of both your team and those from the other areas of the company, but this will allow everyone to understand any issues, resolve them, and move forward with a process that everyone understands.

Everything else is largely secondary. Yes using the right tools makes a difference, yes better knowledge of your audience is crucial, yes there may be improvements to specific areas of the content that could be made, but all of those should start to filter to the top of your pile naturally. However, if the expectations both on your team and from your team are not manageable, then you are only setting yourself up for a lot more pain in the future.

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Sonal Zalkikar has been a part of the Indian Technical Communication industry for the past nine years. Her first tryst was with a local advertising agency as an advertisement copy writer. She moved from media to the IT sphere, and has dabbled in various forms of technical and marketing communication. She currently works as a product trainer and senior documentation consultant for S1 Services, Pune. In her free time, she loves to travel, cook, and play with her pet Labrador. She can be reached at sonalzalkikar@yahoo.com.

REFLECTIONS

A Journey from Content Writing to Product Training

I started my career with a small 50-employee company in the year 2000. The primary responsibility in my first job was copyrighting for health and wellness websites, as well as corporate websites. I switched jobs and graduated to working on user manuals, guides, and online help. Technical writing was yet to be recognized as a full-time career option then. I joined a bigger software services company and was the first technical writer that they ever had. I climbed rungs and moved to bigger designations, better products, and varied deliverables in domains such as security, systems management, telecom, web marketing, business intelligence, and more. This opportunity presented me with a better insight into the software industry. Technical writing had become a known profession by this time and I had a sizeable team of technical writers in a span of about five years.

After doing the entire gamut of writing, leading documentation teams, and dabbling in project management, I was looking to garner more expertise in interacting with customers. So, I decided to take the plunge and joined a multinational product company as a documentation and training consultant for a financial risk analytics and regulatory reporting suite of products. Initially I was slightly apprehensive about getting a more prominent customer-facing role as a trainer. I still remember being a nervous wreck at my first product training for a Japanese banking behemoth. My primary responsibility now shifted to conducting product trainings for Tier-1 banking giants.

REFLECTIONS

The frequent travels to different destinations all over the world were the icing on the cake as I love traveling, absorbing new cultures, and meeting new people. Also, my job profile enabled me to know about product hiccups from real-time users, mediate with business analysts, facilitate functional product testing and quality assurance, and write documentation. As a result, I moved from documentation to a more holistic role in the organization.

Conducting trainings enabled me to step into the user's shoes rather than trying to deliver information by second-guessing what the users wanted. I started analyzing the product and the corresponding document set as a critical user would have. I observed that the training put the focus on the negatives of the product, as most attendants were domain experts, and had crystal-clear expectations from the product and the training.

Training tests your communication skills to the ultimate extent, since you not only harp on the product advantages and train the users how to use it in the best possible way, but also point out why it does not work as anticipated. Training, in essence, needs a complete set of extensive domain knowledge, technical product expertise, and functional business rules. And I totally love this job profile now.

We always have this interesting discussion going on in various technical writing forums as to what is the ideal career path of a technical writer. I don't have an answer that all of you can agree upon, but I do know that I've had an interesting career path till now! I have tried my hands at various forms of technical communication, starting with copy writing, content writing, end-user documentation, business analysis, and now product training—and it has been a challenging but enriching experience!

~ Sonal Zalkikar

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Sumedh Nene is the owner of CrackerJack WordSmiths, incorporated in Singapore. He has over 11 years of technical writing experience in all aspects and phases of documentation life cycle from planning, analysis, and design to development, QA, and implementation of help systems on various media in a high-tech (software) environment. He has had global exposure having worked in Europe, Australia, India, Singapore and the United States. Sumedh holds a certification in technical communications from DeAnza College in USA. His other qualifications include an advanced diploma in business administration from Singapore, postgraduate diploma in computers from India, and bachelor degree in arts (English/German) from India. He is fluent in English, German, French, Hindi and Marathi.

LEGALLY BLAND

Document Review Life Cycle (DRLC)

You've just finished writing a successful document. You've got all the basics right—you reviewed the document yourself and put it through technical reviews as well. You're exhausted, and *almost* satisfied. So why only *almost* satisfied? Patience, my friend, I'm getting there.

Before that, let's quickly look at what I mean by a successful document. As a reader, what in a technical manual (or any reference material for that matter) makes you go, *"Whoa, this manual is awesome, man! It actually makes sense and I could also find what I needed from it, easily"*? Doesn't happen too often, does it? That's because not all technical documentation is designed and structured to incorporate the four features of a successful document:

- Can the reader FIND the required information?
- Can the reader UNDERSTAND the information?
- Is the information COMPLETE?
- Is the information ACCURATE?

We'll deal with how to design and structure a document for all these features at a later date. For now, let's just get back to our discussion on reviews.

The only way to ensure that you have captured all the data in the best possible way is through reviews.

LEGALLY BLAND

So, do you feel that just two rounds of reviews—your own edits and a technical round by a developer are enough? I doubt it very much. I think it's a start, but that's all it is.

Over the years, I've asked a lot of writers, new and experienced, what kinds of reviews their documents go through, and I usually get the same answer: editorial and technical reviews. So, a few of us brainstormed on the review cycles and types of reviews a document can actually be put through—on the lines of SDLC and DDLC. Let's refer to the reviews as the Document Review Life Cycle (DRLC).

Self Review

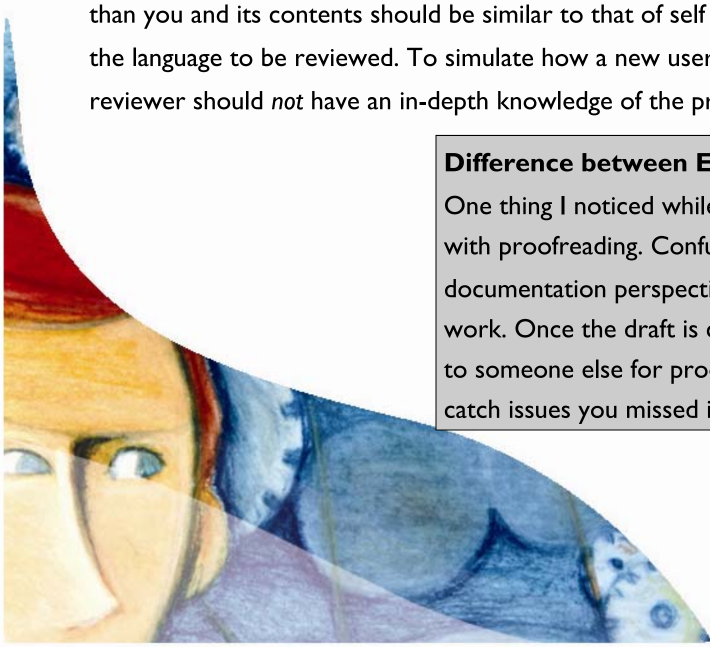
This must be done before any other review. This round ensures your draft is as good as you can make it, before others read it. Issues to watch for in this review should be writing, grammar and style related, for example, typos, punctuation, tenses, capitalization, and so on. Consider reviewing the structure and design errors, for example, updating Index, TOC and other lists, accurate cross-references, consistent use of version numbers, headers and footers, and so on. Though you may not do full justice, it would be ideal to double-check the document for technical accuracy as well, for example, use of appropriate and relevant screenshots, and proper paths of files and parameters. Your first draft is complete only after a round of self review is complete.

Peer Reviews

To be completely confident of what you've written, you can either use peer reviews as an additional review cycle, or use them to replace the self reviews if you're working under tight deadlines and don't have time for self reviews. However, if you find yourself struggling to find time for self checks too often, you might want to pay more attention to your time management and estimation techniques. As the name suggests, these reviews are done by someone other than you and its contents should be similar to that of self reviews. Choose reviewers who have an exceptional grasp of the language to be reviewed. To simulate how a new user (layman) would react to your documentation, the ideal peer reviewer should *not* have an in-depth knowledge of the product you're documenting.

Difference between Editing and Proofreading

One thing I noticed while talking to various writers was that they confused editing with proofreading. Confused? Let me give my take, purely from a technical documentation perspective. Editing is improving your own first draft—you edit your work. Once the draft is complete and you are satisfied from your side, you pass it on to someone else for proofreading—which is others reading your completed draft to catch issues you missed in your editing phase.



"To simulate how a new user (layman) would react to your documentation, the ideal peer reviewer should not have an in-depth knowledge of the product you're documenting."

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Technical Feedback

Once a self check and/or peer reviews are complete, the next round should be of technical feedback. Note that technical reviews need to be done by several people, based on their areas of expertise. For example, database configuration sections of a System Administrator's Guide should be reviewed by the DBA, while the installation and configuration sections should be reviewed by the likes of a build engineer. Ideally, this round should include the document structure (proper sequence of chapters), syntax of code snippets and scripts, enhancing the documented with troubleshooting tips and warnings, definitions of glossary terms, and the overall technical depth. Since documents at this stage have not had a thorough editorial review, it's a good idea to specifically request the technical reviewers to focus on the technical reviews rather than the writing and linguistic issues (which are addressed later in editorial reviews).

Editorial Reviews

While the peer reviewer may not have been an English expert, the reader of the next review cycle, that is, editorial reviews, must be.

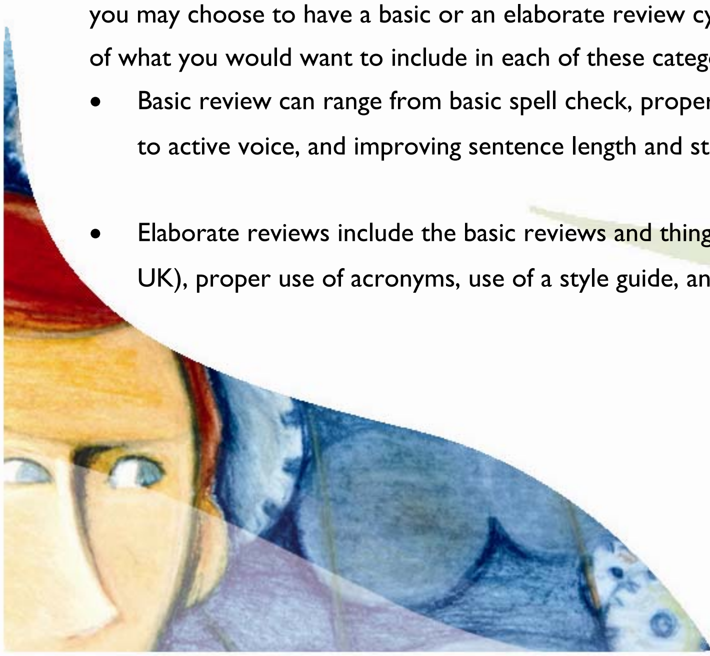
Note: English is used here for simplicity; it denotes the language used in the document.

These reviews are possibly the most crucial from a writer's point of view. While we do know that in the entire document, the onus for technical accuracy lies on the technical people to some extent, however, language accuracy is completely the writer's responsibility.

Depending on several factors, such as your release date, volume to be edited, and availability of a professional editor, you may choose to have a basic or an elaborate review cycle. Based on your requirements, make your own checklist of what you would want to include in each of these categories.

- Basic review can range from basic spell check, proper punctuation, and checking tenses, to changing from passive to active voice, and improving sentence length and structure.

- Elaborate reviews include the basic reviews and things like eliminating faulty parallelisms, checking for locale (US, UK), proper use of acronyms, use of a style guide, and so on.



"It's a good idea to specifically request the technical reviewers to focus on the technical reviews rather than the writing and linguistic issues (which are addressed later in editorial reviews)."

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The editorial and technical reviews you received till now generally require you to make two types of updates to your documents:

- **Content Updates**: Correct the inaccurate left-brains facts (statistics, values, and specific inputs) that can cause confusion if left uncorrected. Enhance the right-brain explanations (such as examples, descriptions, and so on) to make it easier to understand. Add essential information that was left out and remove old features.

- **Structural Updates**: Rearrange chapters and paragraphs for proper sequence and logical approach of the product.

By now, your document should be almost complete—on technical and linguistic fronts at least. *If you are not yet satisfied, consider another pass at technical and editorial reviews.* What remains are a couple of more reviews that are often neglected. These are Legal Reviews and a Sanity Check.

Legal Reviews

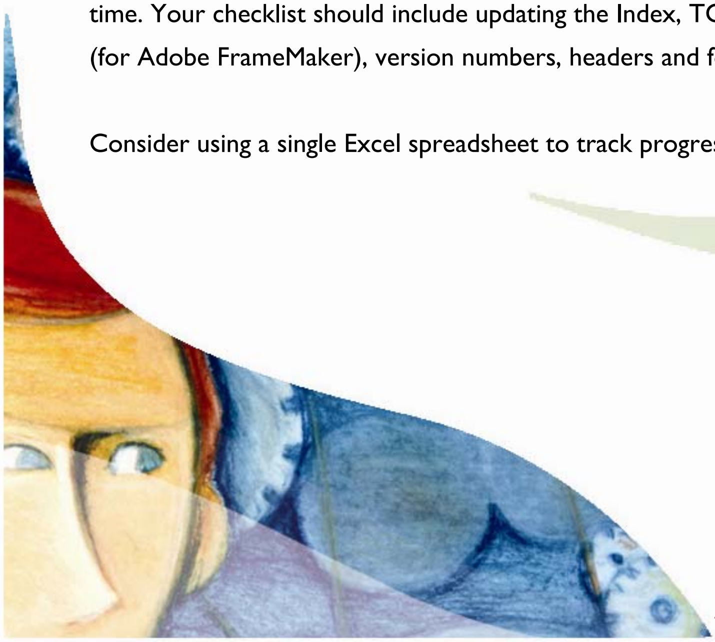
These reviews should be done by the Legal department. They include End User's Licensing Agreement (EULA), Registered Trademarks (®) and Trademarks (™), Disclaimers, and the likes.

Sanity Checks

The final review should ensure there haven't been careless updates or changes to the document, and all the tasks that need to be done for the document are complete. These are termed as sanity checks.

Ideally, you should create a checklist that you should run through, just before the document is checked in for the final time. Your checklist should include updating the Index, TOC, and other lists, removing watermarks and draft markers (for Adobe FrameMaker), version numbers, headers and footers.

Consider using a single Excel spreadsheet to track progress of all documents in your documentation set.



"Ideally, you should create a checklist that you should run through, just before the document is checked in for the final time. Your checklist should include updating the Index, TOC, and other lists, removing watermarks and draft markers (for Adobe FrameMaker), version numbers, headers and footers."

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Here is a sample checklist, done in Microsoft Excel.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		Peer Review (PR)	PR inc?	Tech Review? (TR)	TR inc?	QA Review? (QAR)	QAR inc?	Remove Draft Markers	Convert to HTML?	Indexing complete?	Spell checked?	Legal Reviews?	Status / %age complete	Sanity Check complete?
2	Install Guide	Done-Mike	yes	Done-Alok	yes	Chp2 pending	done		done				98%	
3	Admin Guide	Done-Mike	yes	Done-Milind	yes	Done-Robert	done		done				98%	
4	Reference Manual	Done-Mike	yes	Done-Alok, Milind, Lina	yes	Done-Robert	done		done				98%	
5	Concepts Guide	Done-Mike	yes	Done-Suresh	yes	No QA review expected	NA		done				98%	
6	Quick Start Guide	Done-Alex	yes	Done	yes	Chapter 1 (others pending)	yes		done				98%	
7	Readme	not required	NA	Done-Suresh			NA		NA				25%	

You should keep adding to this list with specific actions as and when you decide to take them. For example, you could add to it the checking in of the latest version to your version control system.

So, as is obvious, there is more to reviews than meets the eye. Reviews are a good thing—they are a writer's friend. Many people work very hard to proofread, review, and improve our (the writer's) work, and when we deliver a document that is highly appreciated, we generally enjoy the limelight. Parting words of wisdom: rather than shying away from reviews as a writer, try and get as many done as you can—they can only do you good.

~ Sumedh Nene

"Rather than shying away from reviews as a writer, try and get as many done as you can—they can only do you good."

This article is written by Girish Sharangpani, CEO and founder of The Knowledge Labs. Girish is a proven technology practitioner with expertise in setting up IT incubation centers, software development, product marketing, and communications. He has over 20 years of experience; predominantly in the information technology space. As a writer, Girish has co-authored technical and research papers on breast cancer, has created posters that were presented in international conferences, and has written patents, FDA, and regulatory documents. He has a graduate degree in advance accounting and auditing from BMCC, University of Pune, and a postgraduate certification in Computer Applications from the same university.

CONFESSIONS

Stepping Into a Manager's Shoes

My career, spanning the last 20 odd years, has been primarily in computer software and systems. Having been a geek in many senses of the word, for my entire information technology life, I've found the 'writing' aspect of it to be the most exuberating and challenging.

At present, I manage a team of technical communicators at Symantec Corporation, based in Pune, India. The team specializes in development and delivery of technical trainings on Symantec products—to our customers, partners, and internal technical support engineers.

That I'm good at technology writing is something I realized purely by accident about 10 years ago. While working at Wrox Press, UK, on my first book as technical editor, I was asked to take a deep dive and contribute to a chapter on MySQL. Subsequently, quite a bit of technology content I wrote went into that book. The book had a moderate success in the market. To cut a long story short, it made me realize that I could write well.

Besides setting up the IT and engineering operations, which was my primary job function at the start of my career, I was also responsible for establishing the in-house documentation team for my employer.

CONFESSIONS

Over the years, I realized that effective, to the point, and user-friendly product documentation forms a critical component of your product's success. And that technical writers who write these documents are the face of your company—the first interface with your customers.

Effective product documentation has a lot to do with usability because improving the usability is essential to the quality, and eventually, the success of your product when it hits the market—be it engineering, software, or any other domain.

To control the quality of documentation, setting up a team was the most legitimate choice, or so I thought. However, the task was not as simple as I had imagined. In fact, I found that recruiting quality technical writers was more challenging than recruiting software engineers, HR executives, or quality personnel. I didn't set any great expectations; I just wanted to recruit young and experienced aspirants with these qualities:

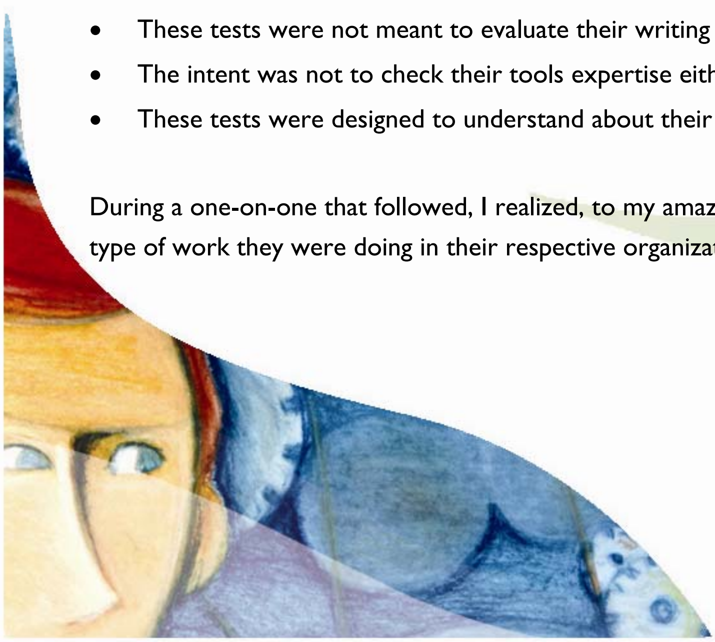
- Ability to explain complex procedures in a simple, clear, and easy-to-understand language
- Ability to work independently, but equally with other team members, including engineering and QA staff
- Ability to identify interest areas within different product verticals that would suit their writing skills the best
- Ability to set priorities

Most importantly, I wanted to hire someone with the right attitude.

To test the abilities of prospective candidates, I designed several case studies, example documents, demos, test of English, and so on, which were based on varied experience levels. However, to my surprise, most of the candidates were way off the mark. Here's why:

- Candidates who appeared for the test failed to realize the true purpose behind the exercise
- These tests were not meant to evaluate their writing skills
- The intent was not to check their tools expertise either
- These tests were designed to understand about their experiences

During a one-on-one that followed, I realized, to my amazement, that most experienced writers were 'bored' with the type of work they were doing in their respective organizations.



"Effective product documentation has a lot to do with usability because improving the usability is essential to the quality, and eventually, the success of your product when it hits the market—be it engineering, software, or any other domain."

In fact, this was their main reason why they were looking for a change. It was not about the money, the work culture, and so on; they were simply bored with the monotonous work.

When I told them, if selected, they'd be writing about a software product built for the Life Sciences industry, they quickly shied away. I've found people to be rigid in terms of their interest areas. And they took great pains in explaining to me why writing on such a vastly different domain could be difficult for them.

I've always felt if you're a good writer, the domain doesn't really matter. What you need is absolute passion for writing. If you have that, you'll run that extra mile, think outside of the box, and understand your audience well…the ingredients I call 'attitude', to be a successful writer; technical or otherwise.

You'll always find that newness in your mundane work if your attitude, approach, and priorities are right. You'll find ways to write the same set of documents differently, and more effectively because there is 'always' a chance for improvement. Every document you write needs a different treatment, a different approach, and a different thought even if you are talking about installation/ setup guides. This is necessary because the audience and the usability may differ each time.

I've often seen technical writers taking great pride in tools expertise. I guess something is wrong with the basic premise on which their career is built. Technical writing tools are just a medium to present your writing in an effective and easy-to-use manner; in my opinion, the content you write holds the key to your success as a writer.

I've also met people who claimed that they were senior technical writers, purely based upon the number of years they had put in the industry. Another wrong premise. Sheer number of years spent in a specific domain/ technology doesn't necessarily qualify you for seniority. Seniority should be gauged in terms of the type of work you've done in a specific workspace; not in terms of number of the years spent, be it a software developer, or a technical writer, or any job specification for that matter.

Transforming information into knowledge, making the complex simple, and writing it into a common business language is the skill (and the job) of a technical writer. However, I've found many who've failed to understand this point-of-view. Some people talk to me as if what they're writing is a piece of art!

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CONFESSIONS

How effectively and timely you write and deliver technical documents matter—both to your customers and to your company. You have to be extremely 'organized' in your thought process, and your approach. We're not here to create masterpieces after all—something all of us should understand up front. I've been able to inculcate this idea in all my teams successfully to date.

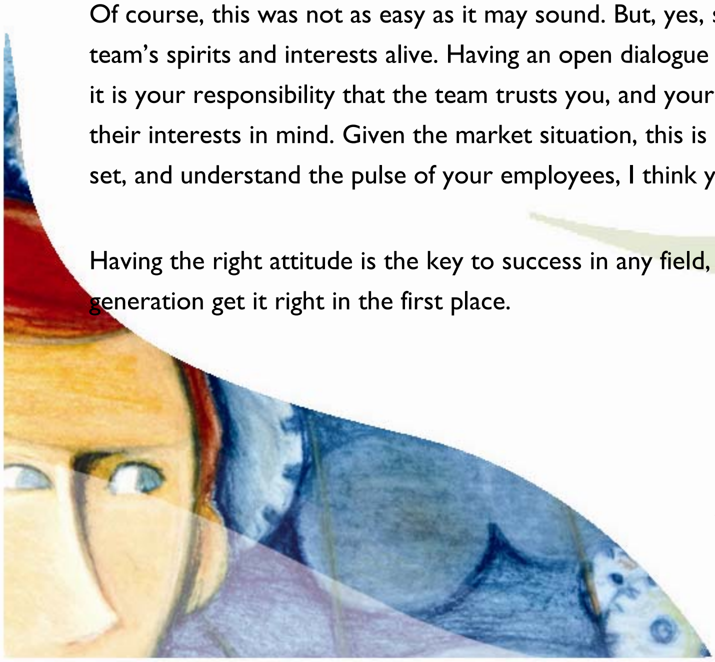
After recruiting a team, getting them to work together was a relatively simple task in comparison. Besides selecting the right mix of youth, experience, talent, and knowledge, it was now important to make them work as a team. Here are some simple techniques I employed:

- Made it aptly clear that the management was serious about the documentation team and, in turn, their work
- Made them responsible, as an individual and as a team, to create quality user documentation that met international standards
- Welcomed their groundbreaking ideas and concepts, and provided more opportunities for them to grow
- Created well-defined guidelines, to-do's and checklists, must-have's, good-to-have, and other categories to maintain the quality of our documents
- Made sure that, in order to write well, they understand and test the product well
- Involved technical writers in product development team meetings
- Inculcated the spirit of cooperation and information sharing, making it an open dialogue amongst the team members
- Made sure that the team members are trained on products they'd be writing about, and the tools they'd need in order to create world-class documents
- Initiated language and editorial review cycles

Of course, this was not as easy as it may sound. But, yes, some of the techniques have helped me in keeping the team's spirits and interests alive. Having an open dialogue with other team members is important, too. As a manager, it is your responsibility that the team trusts you, and your decisions. Give them the confidence that you'll always keep their interests in mind. Given the market situation, this is not always easy, but if you have your tasks cut out, priorities set, and understand the pulse of your employees, I think you're on a right track.

Having the right attitude is the key to success in any field, and it's all the more important that managers of the new generation get it right in the first place.

~ Girish Sharangpani



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This article is written by Geoff Hart. Geoff has reputedly been telling tales (sometimes ending up in considerable trouble thereby) since he was 6, but took nearly 25 years to realize that he could earn a living at this trade. Since 1987, he's worked for IBM, the Canadian Forest Service, and the Forest Engineering Research Institute of Canada. Since 2004, he's been a freelancer, and only occasionally stops complaining about his boss. Geoff has worked primarily as a technical editor, but also does technical writing and French translation. He claims to have survived a few bouts of managing publications groups with only a minor need for ongoing therapy. Contact him by e-mail at ghart@videotron.ca or geoffhart@mac.com

THE MASTER SPEAKS

Managing the Chaos of Freelancing by Taking Control of Your Schedule

As freelancers, we all face the problem of feast or famine: sometimes we're overwhelmed with work, and can hardly find time to think, let alone keep up with our other responsibilities, but other times dust gathers on our computers while we wait for new work to arrive. Clearly, marketing our services and finding new clients is important to avoid the "famine" part of the freelance lifestyle, but what do you do when too much work is arriving?

As a freelance editor, my work primarily involves a large number of small jobs rather than a small number of large projects over the course of the year. In this article, I'll use this situation, which many other freelancers are familiar with, to provide some suggestions on how to manage your work schedule more effectively and attain a slightly more sane work life. The advice I'll provide is equally suitable for freelancers who work on a few large projects, since even the largest projects can be broken down into smaller and more manageable chunks. (Indeed, the really big projects can't be managed any other way.) The same strategies apply, but with an obvious modification: you'll need to budget time at the end for cleaning up and finalizing the whole project.

There's no foolproof solution to the chaos of freelancing, since life sometimes happens all at once and there's nothing whatsoever we can do about it. But there are several tricks that let us juggle life and work considerably better than if we give up and simply accept whatever life throws at us.

THE MASTER SPEAKS

One of the first and most powerful solutions involves gaining more control over our schedules. Doing so requires only four simple steps:

- Learn how much work you can complete within a normal-length day.
- Use some form of calendar to reserve dates for anticipated work and your known commitments.
- Always build some slack time into your schedule.
- Develop a support system.

Learn how much work you can complete per day

Tracking your productivity is important, because it's the only way you'll ever be able to know how long a job will take and thus, how many days you'll need to reserve for a given job. This knowledge is what lets you schedule your work. Each job is at least slightly different from the work you've done previously, but over time, you'll gradually get a feel for your range of productivities, including both your long-term average and the worst-case scenario. A conservative approach to scheduling your work relies on using the worst-case productivity, since that way you can be reasonably confident you'll finish ahead of schedule. Basing your schedule on your average productivity may be more realistic in the long run, but it also means that you'll end up working under significant deadline pressure for half of your jobs and severe deadline pressure for a significant number of jobs.

If you track productivity separately for each client or each type of product, you can further refine your estimates. Best of all, if you get a chance to examine the whole job (for example, the full text of a manuscript to be edited or a carefully defined functional specification for software) before you are asked to provide a quotation, you can base your estimate on the actual work you'll be doing and come up with a much better estimate for that specific job. However, there's a common gotcha to be aware of: early chapters in a book that you'll be editing or the initial product features you'll be documenting in a help system tend to have been developed early in the project, while the author or developer was still well-rested, excited by the project, and not facing insane deadlines. Later parts of the job often take longer than early parts because of creative fatigue, loss of interest, or simple lack of time to do the job right. So try to examine the whole project, not just one or two initial components, before you create an estimate.

The first step to gaining control of your work life is to learn the trick of estimating how long a job is going to take each time a client contacts you with more work.

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THE MASTER SPEAKS

For suggestions on simple ways to track your productivity, I've provided two resources on my Web site:

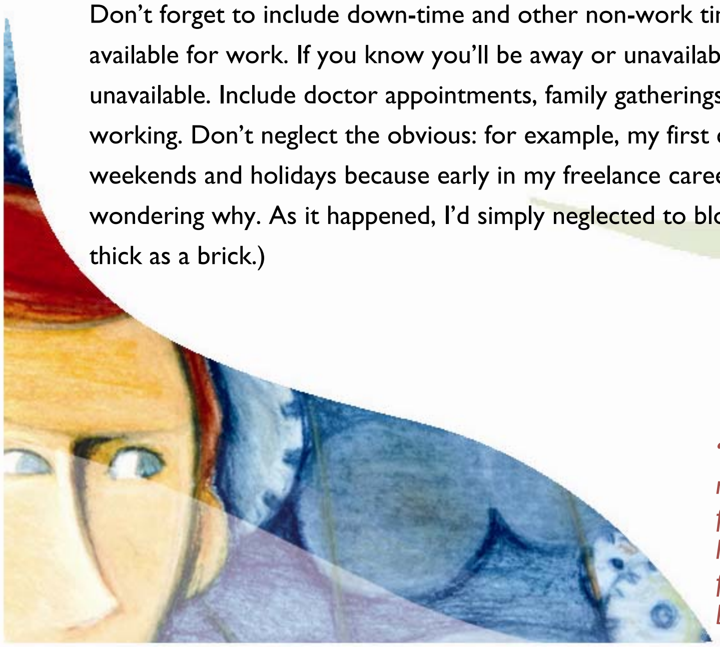
- Chapter 3 of my book on onscreen editing is a free download, and provides details of a simple way to track your productivity. The chapter and the book both contain other useful information on how to manage the freelance life.
- For a more detailed discussion of how to budget, read Estimating project times and costs without losing your shirt—or your sanity.

Use some form of calendar to reserve dates

Once you know how long a job will take, the next step is to schedule the work. Doing so requires some form of calendar, whether you implement it on paper or in software. (Different strokes for different folks!) Basically, your goal is to recognize that there are only so many working hours in a week, and that all your work must be fitted into those available time slots. Once a slot is full, it's no longer available for other work, and finding a way to account for this in your schedule is the key to regulating your workflow better.

In the previous step, I asked you to determine how much time a job will take. Now your goal is to look at your calendar and find the first day when you can begin that work. Mark the day (or days) on your calendar as "Reserved for [name of job]" so you won't double-book those days for other work. One of the biggest mistakes freelancers make is failing to reserve dates for future work on those rare and happy occasions when a client gives us advance warning about when a job will arrive. If you have clients that predictably send you work such as annual reports, quarterly newsletters, or annual funding proposals at specific times of year, reserve those days each time you start marking up your calendar for a new year, and add a note in your reminders program a month before these periods so you can contact your client and confirm whether the work will arrive on schedule.

Don't forget to include down-time and other non-work time commitments that will reduce the number of hours available for work. If you know you'll be away or unavailable for part of a day, mark that part of the calendar as unavailable. Include doctor appointments, family gatherings, meetings, or anything else that will prevent you from working. Don't neglect the obvious: for example, my first calendars were clearly marked "no work today, idiot!" on weekends and holidays because early in my freelance career, I was constantly working through the weekend and wondering why. As it happened, I'd simply neglected to block in those days as unavailable for work. (Sometimes I'm thick as a brick.)



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THE MASTER SPEAKS

Reserve all your known commitments (for example, an hour a day for exercise or watching your favorite TV show) *before* you start allocating your time for the coming month. You won't always be able to honor every commitment, but you've got a much better chance of success if you're at least willing to try to give your real life equal priority to your work life. For longer allocations of time, such as vacations, add a note in your reminders program to notify all your main clients well in advance so they can plan around your schedule. (Many won't bother, but each one that does is one less client likely to cause problems around that time.) One useful, though mildly unethical, approach involves telling clients you're leaving a couple days earlier than you really are leaving. This way, if any emergencies arrive at the last minute, you still have time to handle them—or to find someone else who can do so. (More on the latter topic in the penultimate section of this article.)

Paper works adequately for calendars, but software solutions provide far more flexibility when it comes to rearranging your schedule. What software should you use? Options range from behemoths such as Microsoft Project to smaller and nimbler tools such as the task and calendar tools built into Microsoft's Outlook or Apple's iCal. Everyone eventually finds an approach that suits their unique needs, and the key is to invest some time experimenting until you find an approach that works well for you. For example, I've found an approach that, though kludgy and inelegant, works better for me than more complex and powerful solutions: I use iCal for reminders and small notes, but I use nested folders on my computer's desktop to organize my work life. You can see what this approach looks like in Figure 1. The key concept behind my approach is that I use a single "Work" folder to gather all my work together in one place, and use Macintosh aliases ("shortcuts" in Windows) that point to the actual folders that hold the work for each project. Adding the date at the start of each folder name lets me schedule the work.

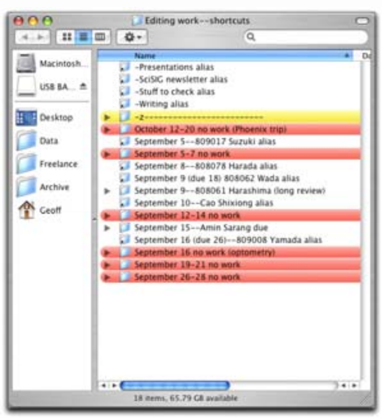


Figure 1. Using nested folders to organize your work schedule.

"One useful, though mildly unethical, approach involves telling clients you're leaving a couple days earlier than you really are leaving. This way, if any emergencies arrive at the last minute, you still have time to handle them—or to find someone else who can do so."

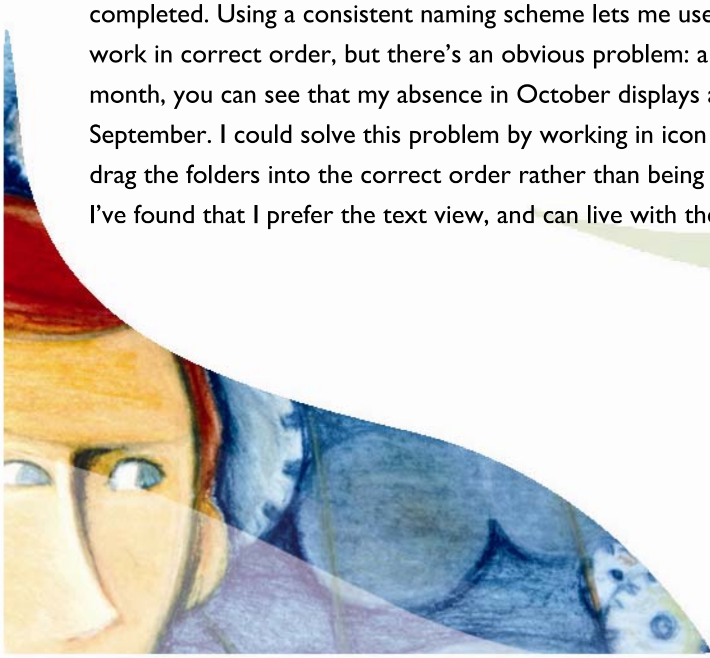
THE MASTER SPEAKS

Each month, I create a new series of named folders to reserve non-work days for weekends, holidays, and other times I won't be available for work. For a weekend, a typical folder might be named "September 12-14 no work". (Note that I've also marked most Fridays as unavailable for work. We'll come back to that point in the next section.) Similarly, the screenshot shows a planned absence in the form of a working vacation during which I'll be giving a workshop to a local STC chapter and then taking a few days of vacation: "October 12-20 no work (Phoenix trip)". Folders representing dates when I'm not available for work are highlighted in red to distinguish them from folders representing work.

In the screenshot, you'll see two different types of work folder: Folders such as "September 8--808078 Harada alias" represent a project I've already received and that is ready for editing when time permits, but no later than that date, whereas the folder "September 9--808061 Harashima (long review)" is a placeholder for a job that hasn't yet arrived but that is due to arrive on the specified date. I'll replace that one with an alias to the real folder once the files are on my hard disk. Folders that contain the word "alias" (the Macintosh version of Windows shortcuts) point to the actual working directory, thereby providing direct access to that directory without having to click my way several levels deep into my hard drive. This is important for me because I have clients in dozens of countries, and several large clients in two countries, requiring a strongly nested folder hierarchy on my hard drive.

Note that I've also used a yellow-highlighted folder that does nothing but separate ongoing tasks (such as the newsletter that I publish for STC's Scientific Communication SIG and a list of presentations I'm currently working on) from the actual paying work. Because most operating systems sort names beginning with a hyphen before names beginning with letters, adding a hyphen to the names moves these folders to the top of the list. Other useful tricks such as adding a number before each name lets you take advantage of the operating system's default ordering rules.

The resulting display provides an "at a glance" list of the work that needs to be done, and when it needs to be completed. Using a consistent naming scheme lets me use the built-in display options on my computer to place the work in correct order, but there's an obvious problem: although the order of the folders is correct within any given month, you can see that my absence in October displays above (before) the work that must be completed in September. I could solve this problem by working in icon view instead of text view, since that would let me manually drag the folders into the correct order rather than being constrained by the operating system's sorting preferences. I've found that I prefer the text view, and can live with the tradeoffs.



"Using a consistent naming scheme lets me use the built-in display options on my computer to place the work in correct order, but there's an obvious problem: although the order of the folders is correct within any given month, you can see that my absence in October displays above (before) the work that must be completed in September. I could solve this problem by working in icon view instead of text view, since that would let me manually drag the folders into the correct order rather than being constrained by the operating system's sorting preferences. I've found that I prefer the text view, and can live with the tradeoffs."

THE MASTER SPEAKS

When I finish a job, I simply delete the alias pointing towards it, which has no effect on the actual folder that contains the project, and move on to the next project on the list. When new work arrives, I can see at a glance when I'll be able to fit it into my schedule, and I can immediately propose that deadline to the client. If urgent work arrives, with a tight deadline, I can see (based on the dates in the work folder) which projects can be pushed back a day or two. For example, the folder "September 9 (due 18) 808062 Wada alias" tells me that I should try to get the job done by the 9th, but that I can let it slip by up to 9 days if more urgent work arrives unexpectedly. In the next two sections, I'll discuss how to handle such surprises.

Always build some slack time into the schedule

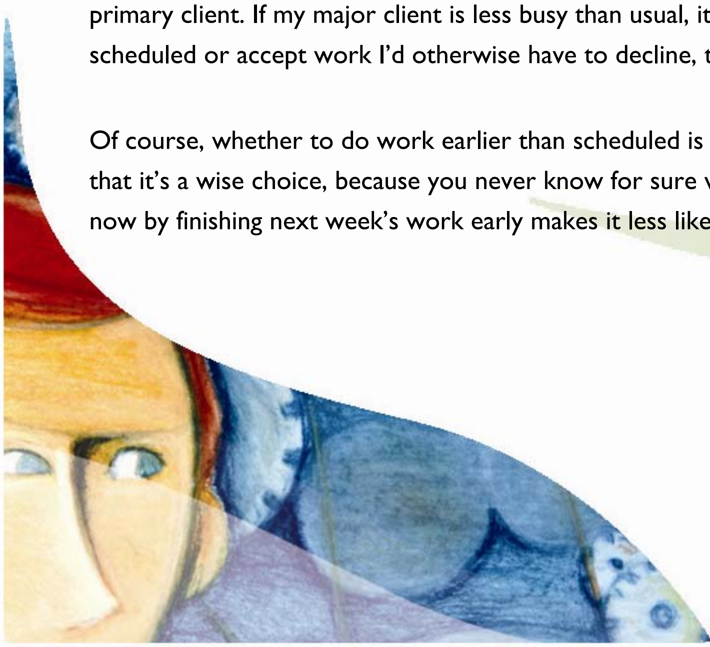
When a client contacts you to discuss new work, learn to always ask them two questions:

- When would you *like* to receive this job?
- When do you really *need* to receive it?

Most of the time, there's a significant gap between the two. When you record the job on your calendar, carefully record both dates. If unexpected or more urgent work arrives, knowing the true deadline provides an opportunity to juggle your schedule (that is, push back the date on a less-urgent job) so you can fit in the new work.

This approach is a specific example of a more general principle: always build in a day or two per week of empty time that you can use when a job takes longer than expected or something urgent arrives. The more flexible the schedules of your clients and the more predictable your workflow, the less empty space you'll need to set aside. Over time, you'll gradually get a feel for how much work is likely to arrive in a typical week. For example, my major client typically sends me two to three jobs per week, and more than that during busy periods. Knowing this, I no longer accept more than two or three jobs from other clients in any given week because doing so might leave me unavailable to that primary client. If my major client is less busy than usual, it's easy for me to complete other work earlier than originally scheduled or accept work I'd otherwise have to decline, thus giving my other clients a pleasant surprise.

Of course, whether to do work earlier than scheduled is a bit of a judgment call. If you're as busy as I am, you'll find that it's a wise choice, because you never know for sure what will arrive on your desk next week, and freeing up time now by finishing next week's work early makes it less likely that you'll have to turn away work or pull an all-nighter.



"Always build in a day or two per week of empty time that you can use when a job takes longer than expected or something urgent arrives."

THE MASTER SPEAKS

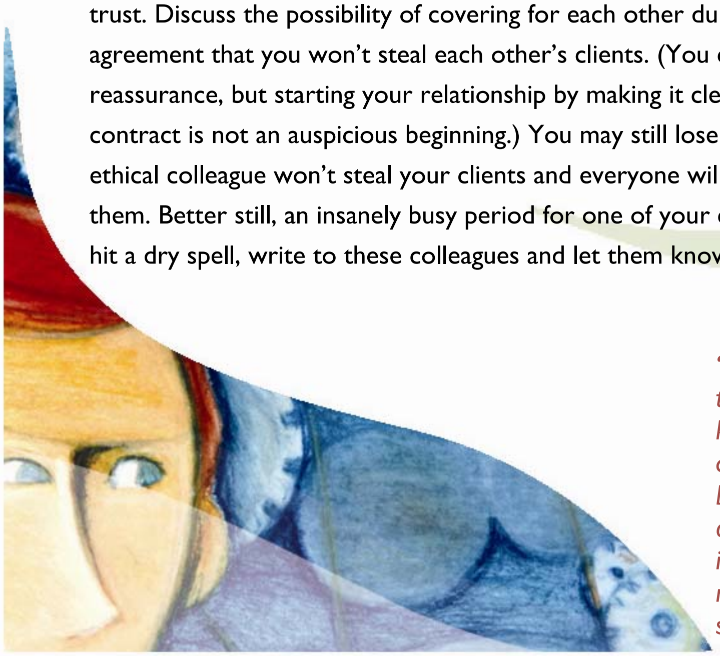
On the other hand, sometimes you simply need a day off to decompress, and the risk of longer work days next week isn't the worst alternative.

As I noted in the previous section, I've implemented my own advice by marking my Fridays as unavailable for work. This serves two purposes. First, I'm growing sufficiently old and prosperous that free time is becoming more valuable to me than a few extra dollars. During slow periods, this means that I can often take a 3-day weekend and use the extra time to work on my own writing. Second, this automatically gives me one day per week of flex time that I can allocate to rush jobs or unexpectedly long jobs that require more time than I budgeted. I still often end up working most Fridays, particularly when I know that I'll be leaving for a long trip and need to store away a bit of extra money to cover my lack of earnings during that period, but asking clients when they *really* need a job returned often lets me defer a job until the following week. Then, if I do need to work on a Friday, or if I know something big is coming the following week, I use the extra hours on Friday to avoid a serious work crunch the following week.

Develop a support system

All of this is great in theory, but in practice, sometimes everything hits the fan simultaneously and there's simply too much work for any one mortal to handle. Pulling an all-nighter or working a 60-hour week is sometimes possible, but it's not a good long-term survival strategy, even if you're young enough to survive what programmers glibly refer to as a "death march". (I no longer am.) Yet there's always the fear that if you turn away a client because you're too busy, they'll never come back to you. Fortunately, there's a reasonably effective solution.

That solution involves finding one or more colleagues you can trust to do work that's up to your personal standards and who also won't steal your clients. Yes, such people exist; I'm one of them. In those periods when you have some downtime, spend some time finding two or more colleagues who are willing to do this kind of work and who you can trust. Discuss the possibility of covering for each other during rush periods, with an explicit but informal verbal agreement that you won't steal each other's clients. (You can also make this a formal legal contract if you want more reassurance, but starting your relationship by making it clear that you don't trust your colleague without a signed contract is not an auspicious beginning.) You may still lose an occasional client this way, but if you choose wisely, an ethical colleague won't steal your clients and everyone will sleep a bit easier knowing they have someone to cover for them. Better still, an insanely busy period for one of your colleagues may coincide with a slow period for you. If you hit a dry spell, write to these colleagues and let them know. They may be happy to send you some of their work.



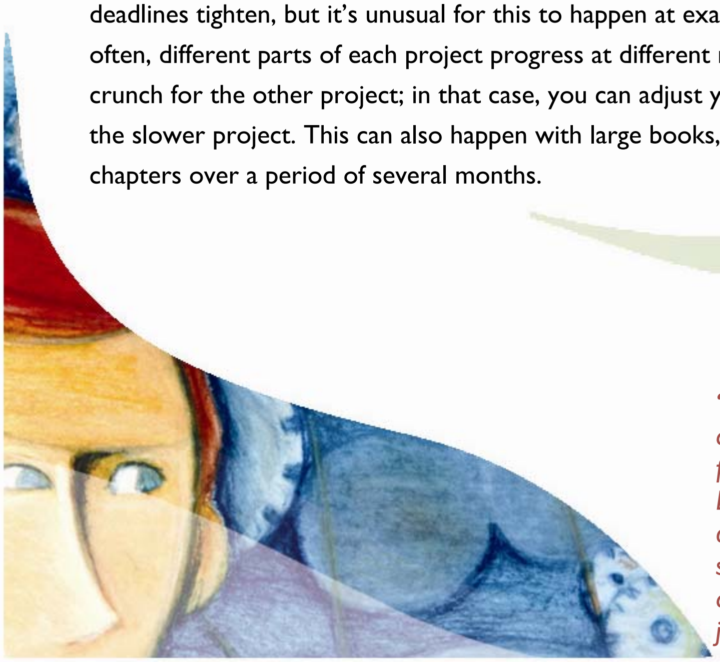
"In those periods when you have some downtime, spend some time finding two or more colleagues who are willing to do this kind of work and who you can trust. Discuss the possibility of covering for each other during rush periods, with an explicit but informal verbal agreement that you won't steal each other's clients. (You can also make this a formal legal contract if you want more reassurance, but starting your relationship by making it clear that you don't trust your colleague without a signed contract is not an auspicious beginning.)"

I work this way and refer potential clients to a few colleagues purely as a friendly gesture: I don't charge them any money for this service, and I don't count up their debts to me. I've been blessed with more than enough work, and have several colleagues who aren't so fortunate and who could use a few extra billable hours. The benefit of this approach to me is that I'm not responsible for the quality of their work, and I make this quite clear to the clients when I give them the referral: "Here's someone who can handle this work for you. I will not be supervising their work, but they've been doing this work long enough that you can feel confident in their expertise." If you're more entrepreneurial than I am, you can also subcontract such jobs, and then do quality control on the subcontractor's work to ensure that it's up to your standards. Personally, I find this way too much overhead, but it might be a very good solution for you, particularly if you're still building your client list and need a bit of extra income.

Parting thoughts

I started this article by noting that this approach can be modified to cover a range of other situations. For example, what can you do if you receive offers for two large projects that must be worked on simultaneously? Typical examples might be when two publishers ask you to edit large textbooks simultaneously, or when a software developer asks you to document two large modules of a larger program at the same time. Although it's clearly more efficient to focus on one project at a time, it's often appropriate to budget half your work week for each project, and switch horses every Wednesday at noon. Each job will take roughly twice as long as if you worked on only one project at a time, but if you designed your initial scheduling estimates to account for this situation when you accepted the work, you'll often still be able to complete both jobs on schedule. This is particularly true for software documentation early in the development process, when many parts of the software are being delayed or constantly revised, and you may not have enough work to devote a full week to the product.

Things become dicier towards the end of the job, as the software begins to stabilize, more features are complete, and deadlines tighten, but it's unusual for this to happen at exactly the same time for projects from different clients. More often, different parts of each project progress at different rates, and a slow period for one project will overlap a work crunch for the other project; in that case, you can adjust your schedule to fit in more of the crunch project and less of the slower project. This can also happen with large books, particularly when multiple authors are contributing chapters over a period of several months.



"Although it's clearly more efficient to focus on one project at a time, it's often appropriate to budget half your work week for each project, and switch horses every Wednesday at noon. Each job will take roughly twice as long as if you worked on only one project at a time, but if you designed your initial scheduling estimates to account for this situation when you accepted the work, you'll often still be able to complete both jobs on schedule."

For this approach to work, you need to discover factors that might impose the same deadline or a non-negotiable deadline on two large projects. In software documentation, this might happen when two programs must be released at the same trade fair, such as INTEROP or in time for the annual tax preparation season. For books, you might need to complete a project sufficiently far in advance that the book will be available at the start of the school year, in time for the Christmas book-buying season, or a big annual book fair. The only way to discover such pressures is to ask your clients whether any such factors might affect their delivery schedule for the product. (Note that I said their schedule, not your schedule. Clients can sometimes be amazingly clueless about how your schedule relates to their schedule, leading to unpleasant surprises.) For some additional tips on learning about organizational schedules, consult the “survival skills” part of my article on Improving your editing efficiency.

Learning to schedule your life more sanely also has strong ties to what may be your most crucial task as a freelancer: establishing a slush fund to cover your expenses those times when the work stops flowing or illness prevents you from working. (This also helps you to afford periodic vacations.) This isn’t optional if you freelance: make it a priority to build up 3 to 6 months worth of savings that you can tap during slow periods or illnesses, even if it means giving up beer and movies for a couple of months to save that money. If you have a family to support, consider buying disability insurance to cover you against illnesses; other forms of income-replacement insurance may be available, so ask an insurance broker about your options. Knowing that your slush fund is full lets you sacrifice work on the occasional Friday, whereas knowing that it’s underfunded or that you’ll be drawing it down soon (for example, to pay a quarterly tax installment) reminds you to work longer weeks. For some tips on this, see my article Tax tip: a personal savings plan that works.

The freelance life isn’t always unpredictable, and is sometimes unpredictable in a very stressful way. But the first step in mitigating that stress is to take steps to gain some control over your schedule. This article covers a few basic strategies you can use to improve your control. Your own work situation will clearly differ from mine, requiring various modifications to the approach I’ve proposed, and there are other stresses I haven’t covered that require different solutions. But as this article shows, the important thing is to decide that you’re willing to devote a little time to developing strategies that will minimize those stresses—and these strategies don’t need to be particularly complicated. Such simple steps can take you a long way towards a more enjoyable freelance career.

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Managing the chaos of freelancing by taking control of your schedule.

http://www.stcsig.org/cic/pages/links.htm#Consult

~ Geoff Hart

“The freelance life isn’t always unpredictable, and is sometimes unpredictable in a very stressful way. But the first step in mitigating that stress is to take steps to gain some control over your schedule.”

A business management postgraduate, with a degree in Computer Science and over 14 years of industry experience, Gayatri Athreyan is currently working as Technical Publications Manager with Wipro Technologies. Having started her career in software development and training with Orient Longman, Gayatri has played a variety of roles across various organizations. Her career graph spans from technical writing, instructional writing, business writing and multimedia, to a stint with quality processes and auditing as well. More recently, Gayatri has been involved in project management roles, and has handled business development support and customer relationship in the documentation services arena. You can contact her at gayatri_athreyan@yahoo.com.

SPOTLIGHT—PART I

Interview with Gayatri Athreyan

1. **Tell us something about your total experience as a technical writer (Number of years).**

   Well, in all my earlier jobs, I have had a writing role – just that the kind of writing has been varied. So you could say I have more than 14 years of industry and writing experience; but if you look at strictly technical writing experience, it is around ten years.

2. **You hold a graduate degree from Osmania University, and an M.B.A with specialization in Finance and MIS from IGNOU. With such a varied educational background, how did you get a foot-in-the-door?**

   That is an interesting question. I entered the industry when technical writing was not yet a recognized field. So, predictably, I entered into a role that called for software development and training. As part of that role, I was required to generate user manuals and training material – just because I had good language skills and a flair for writing. And it was thus, you could say, that I realized my calling. So here I am; and am here to stay primarily owing to my passion for this field.

3. **When did you realize you were a writer at heart?**

   Like I mentioned, in my first job, I was called upon to write training guides and user manuals.

SPOTLIGHT—PART I

I learnt DTP packages on the job, started working on the guides, and realized that I simply loved what I was doing. Gathering information from various sources, analyzing the content, structuring them into a logical flow, designing the look and feel of documents, and putting them all together to give shape to the visualized design – all this gave me a high. That is when I realized this is what I want to do.

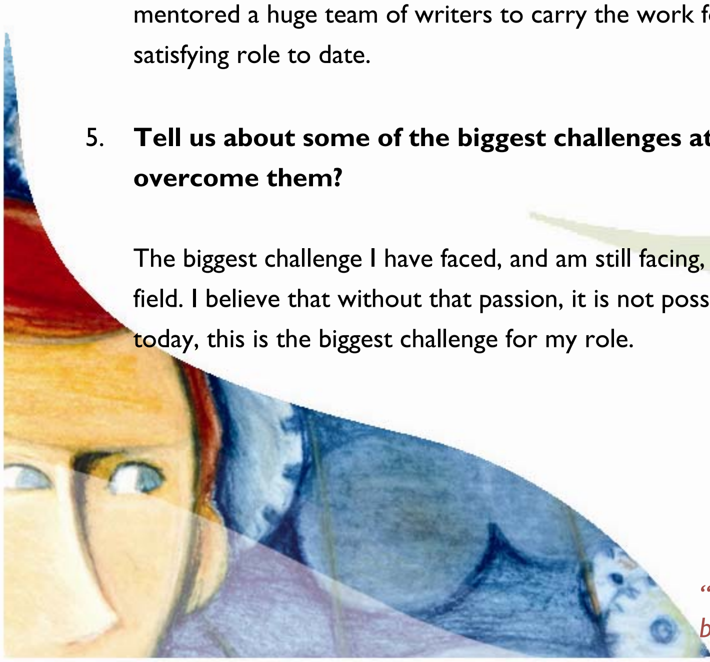
4. **Your portfolio boasts of varied experience with companies like Orient Longman, IMR Global, Cordys R&D India, Trina Systems, Citec Information India, and Wipro Technologies. You also worked as a consultant, a technical executive, and a QA coordinator. Which role did you enjoy the most? How did the transition to writing happen?**

   It has been a gradual but rather structured transition. Each job I moved into has leveraged my earlier skills and added to my competencies, thus making me a better professional each time. Orient Longman gave me an insight into what I enjoyed and got me started on the writing bandwagon. IMR Global taught me process writing, and educated me in quality processes, ISO, and CMM. Cordys established me as a technical writer of credibility, and gave me a platform to truly exhibit my writing and mentoring skills. Trina Systems was an avenue I chose for myself, to explore the learning aspects and to broaden my horizons into the learning management space. Citec saw me moving forward to handling teams and projects for documentation, and exploring the business areas of documentation services. Now at Wipro, I am able to use all those skills, while also expanding my experience to a larger scale of operations in the technical publications service offering.

   I have enjoyed each role and the challenges it brought. Every challenge has been rewarding and enriching. But if you still insist on the one role I enjoyed the most, it was perhaps Cordys, where I started the technical writing practice from scratch, designed and built the baseline product documentation almost singly, and then built and mentored a huge team of writers to carry the work forward. That, I would say, was the most enjoyable and satisfying role to date.

5. **Tell us about some of the biggest challenges at your workplace in all these years. How did you overcome them?**

   The biggest challenge I have faced, and am still facing, is not being able to find writers who have a passion for this field. I believe that without that passion, it is not possible to give it your best. As a technical publications manager today, this is the biggest challenge for my role.



"The biggest challenge I have faced, and am still facing, is not being able to find writers who have a passion for this field."

Of course, I have been trying to overcome this limitation through adequate trainings, mentoring programmes, competency drives, and so on. But these still have a long way to go, in meeting this challenge.

6. **As an STC India chapter member, you have actively contributed towards knowledge dissemination—especially at the STC India annual conferences. What are your views about the role of STC India chapter in promoting the profession in India?**

   Over the years, I have seen the STC India chapter emerge as a really strong forum, which brings together some of the best talent in the technical writing profession in the country. The annual conference gets better each year, with new ideas and papers flowing in.

   I would still like to see the forum being utilized constructively for the purpose with which it was formed. Currently, although it is used for knowledge sharing, it is seen more as a networking and visibility exercise. Forgive me if I am being candid here. But we need to move beyond that and start truly sharing knowledge and ideas. We need to create that synergy so that the Indian technical writing community can get ahead.

7. **In your opinion, what are the necessary skills required to succeed in our profession?**

   First and foremost, a passion for the field. That passion would naturally bring along a craving to continuously learn and improve.

   Apart from the oft-stated essentials such as excellent communication skills, great language skills, and competencies, I would say that a writer needs the following essential ingredients in order to succeed:

   - The ability to get the big picture, and at the same time appreciate the details
   - The ability to think beyond 'documents' and think of 'user assistance' in the true sense of the term
   - The ability to structure and design information, with the end objective in mind
   - The ability to appreciate and follow patterns, processes, and guidelines

"We need to create that synergy so that the Indian technical writing community can get ahead."

SPOTLIGHT—PART I

8. **Do you feel writers should be well versed with technology?**

   Yes, some amount of technical know-how and aptitude has today become a must for this profession. While earlier you could get away with editorial skills, the demands on a technical writer are higher today; the writer is expected to understand the product and generate content with minimal help from SMEs. Again, this may not necessarily mean technically qualified writers – writers with a thirst for knowledge and an aptitude to pick up technology would be able to do equally well too.

9. **What is the primary source of inspiration for you as a writer?**

   The constant need for good writing and editing skills, and the void in the articulation space. The more I see badly written communication and documents, the more I see ambiguous and unclear communication, the more I am urged to pitch in and improve it.

10. **Describe your process of writing. As a technical writer, how significant is your job function to the organization?**

    There is no specific process I follow. But yes, the task I spend most time on is the analysis and design phase. I take much more time to come up with the outline and information architecture of the documentation, and spend considerably lesser time actually writing it. I believe that is the right approach if you want a good document at the end.

    I would like to believe that my job function is extremely important to my organization – don't we all like to believe that? On a serious note, Wipro's Technical Publication practice is still nascent and growing. So I do feel my experience and competencies are extremely important at this stage, to equip the team to move forward with the right attitude and aptitude, and to be able to meet documentation requirements of varied customers and products in a most effective manner.

11. **What positive changes have you tried to bring about in your organization?**

    In every organization that I have worked for, I have tried to bring about an appreciation for this field.

"I would like to believe that my job function is extremely important to my organization – don't we all like to believe that?"

SPOTLIGHT—PART I

It is important for all members of the organization (at least the stakeholders and decision makers) to understand and appreciate the technical writing domain, its nuances and challenges, its skills and competencies, its demands and diversities, as well as its user-benefits and business value-add.

12. **Have you made a conscious attempt to promote yourself as a technical writer?**

No, I don't believe I have made a conscious effort to promote myself as a technical writer. Yes, within my various organizations I have constantly tried to promote the technical writing aspect and tried to show value-add through my work. In that sense, I have always promoted good documentation.

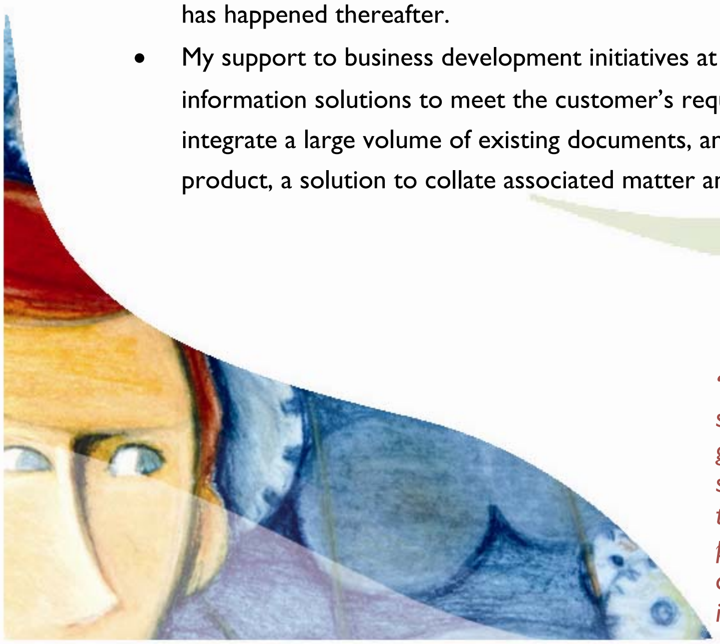
13. **What do you feel about the technical writing scene in India?**

Again, I seek permission to be candid here. While we do have some real good talent among the seasoned and experienced writers, I see a sheer dearth of good talent coming in. The boom in this field had also seen some drifters and professionals who 'can-also-write'. I think that needs to change. I reiterate – we need writers who are passionate about this work and are willing to learn and share constantly. We perhaps need stronger training and mentoring initiatives across the community to overcome limitations.

14. **What do you consider as your greatest achievement as a writer?**

Couple of achievements that instantly come to mind:

- My contribution to the Cordys baseline documentation, and the re-engineering of that baseline using information mapping principles to make it modular, which set the ground for all product documentation that has happened thereafter.
- My support to business development initiatives at Citec and Wipro, where I could analyze and design information solutions to meet the customer's requirements. These were as varied as an IETM solution to integrate a large volume of existing documents, an integrated help and learning system for a software product, a solution to collate associated matter and put together a customer catalog, among several others.



"While we do have some real good talent among the seasoned and experienced writers, I see a sheer dearth of good talent coming in. The boom in this field had also seen some drifters and professionals who 'can-also-write'. I think that needs to change. I reiterate – we need writers who are passionate about this work and are willing to learn and share constantly. We perhaps need stronger training and mentoring initiatives across the community to overcome limitations."

SPOTLIGHT—PART I

15. **Any books you read of late?**

    I am a voracious reader and my reading interests vary – from Calvin and Hobbes and P G Wodehouse, to Agatha Christie and Mary Higgins Clark, and from popular fiction to heavier reading matter. The last book I read (a week ago) was *Ring for Jeeves*, a P G Wodehouse classic. The book I am reading now is *The Touch* by Colleen McCullough.

16. **Whom do you admire the most as a technical writer?**

    I don't think I can name any one person here. In my varied organizations and roles, I have come across some technical writers who come with fantastic language skills, while some others brought in vast knowledge and expertise in the technology aspects of writing. Yet again, some of my associates have showed a keen intuition of user assistance, while some others have displayed very good insights into the business of documentation. I can just say that I find something to admire in and learn from each person I meet and work with.

17. **Any advice for the newbies?**

    Learn all you can, and constantly upgrade yourself with what is happening in the field of technical writing. Develop a love for what you do, and constantly try to improve what you write, with the focus always on the target audience. Develop the habit of reading (if you do not already do it) – that's the best way you can improve your language as well as your knowledge.

~ This interview was conducted by Chakravarthy Tenneti

"Learn all you can, and constantly upgrade yourself with what is happening in the field of technical writing. Develop a love for what you do, and constantly try to improve what you write, with the focus always on the target audience. Develop the habit of reading (if you do not already do it) – that's the best way you can improve your language as well as your knowledge."

Donna Parrish is the publisher of *MultiLingual*, a magazine for the language and international business community. She is also co-organizer of the Localization World, Localization Latin America and Worldware conferences. Prior to her work at MultiLingual Computing, Inc., Donna was a computer programmer for 25 years. Donna holds a degree in mathematics from Peabody College of Vanderbilt University. She can be reached at donna@multilingual.com.

SPOTLIGHT—PART II

Interview with Donna Parrish

1. **Tell us something about your education. Did you study to become a writer?**

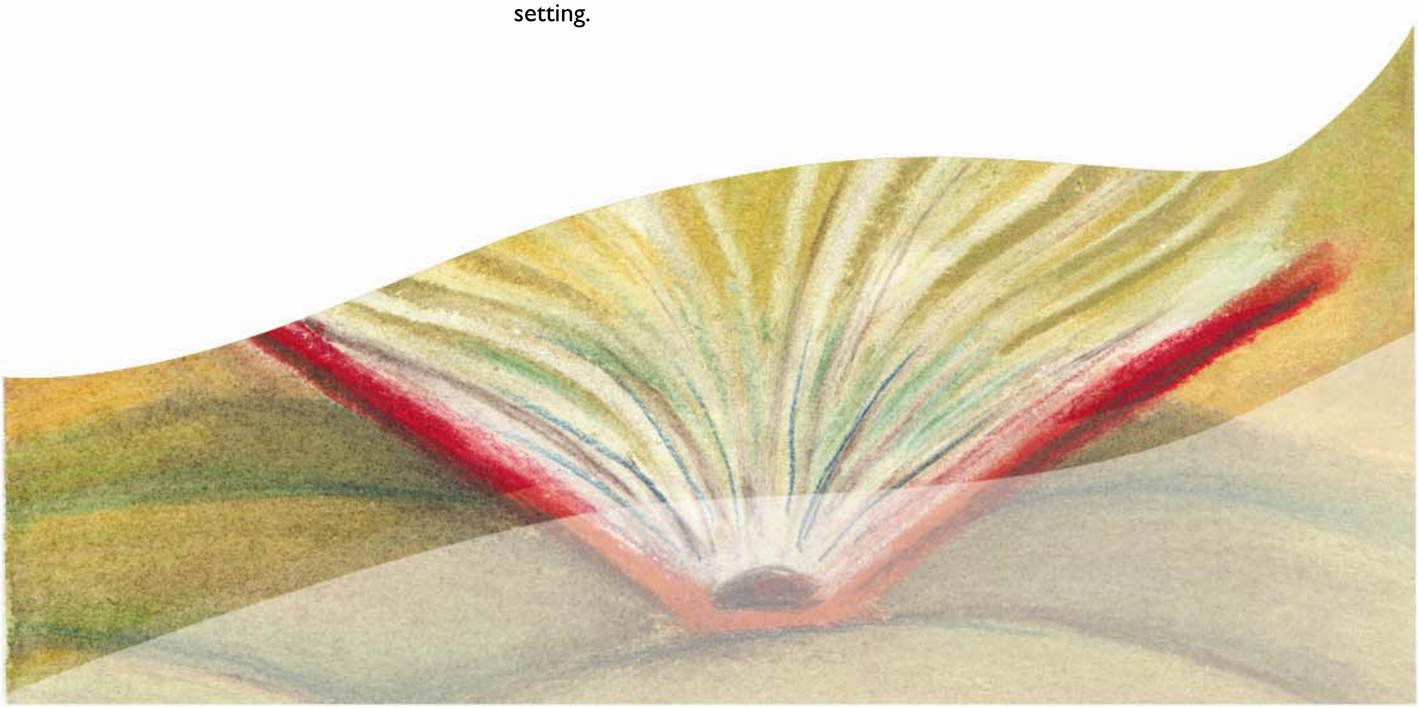
   No, I did not. While English was a preference as my college major, I decided that a mathematics degree would allow me more career flexibility. Plus, I liked math!

2. **You were a systems analyst and a computer programmer before you became an editor. When did you realize you were an editor at heart?**

   I am not sure I *am* an editor at heart! But I enjoy our subject material very much, and so I am interested in presenting it in a comprehensible manner to our readers.

3. **How did you secure an editorial position at MultiLingual Computing?**

   I came on board with a job title of "special projects." This meant that I did anything that needed to be done. After several years, I was promoted to editor. I then purchased the company in 2002 and thus became editor-in-chief. Funny thing, I still do anything that needs to be done! This is not uncommon in a small office setting.



SPOTLIGHT—PART II

4. **What challenges did you face as an editor?**

   One constant battle that we face is that we receive editorial submissions that have good substance, but the authors have included information that sounds like an advertisement. I think that sometimes this is even unintended because authors are so involved with their service or technology that they do not realize how promotional their prose sounds.

   Another problem that we encounter is that often English is not the first language of our writers. While I admire anyone who is able to write an article in a secondary language, we must try to make sure the article retains the voice of the author without impeding the flow of the ideas.

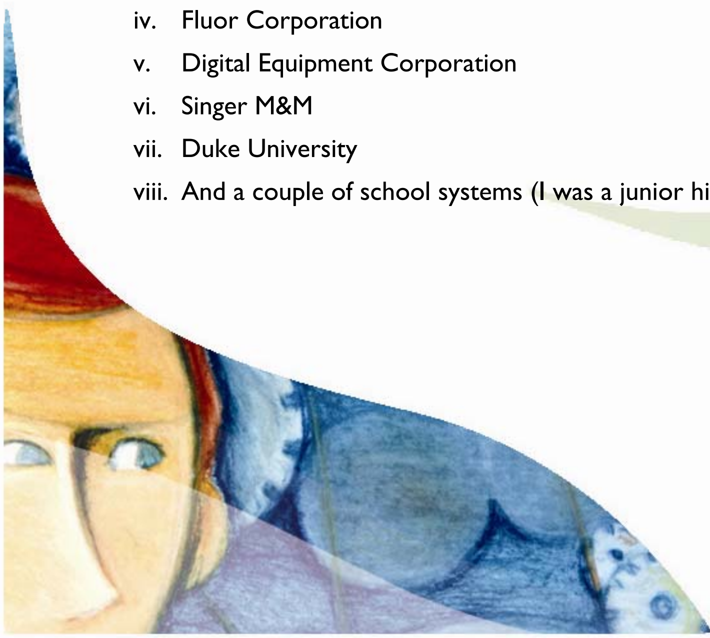
5. **What efforts did you make to overcome these obstacles?**

   We work with contributors to create an appropriate tone for the articles. Often this takes several iterations of submissions, followed by serious editing on our side. We stress to our authors that readers will be more impressed by information sharing than by self-promotion.

6. **Tell us about your work experience. List the companies you have worked with to date.**

   Working backwards:

   i. MultiLingual Computing, Inc.
   ii. Schaffer Computer Software Services
   iii. Self-employed programmer/ consultant
   iv. Fluor Corporation
   v. Digital Equipment Corporation
   vi. Singer M&M
   vii. Duke University
   viii. And a couple of school systems (I was a junior high math teacher).



"While I admire anyone who is able to write an article in a secondary language, we must try to make sure the article retains the voice of the author without impeding the flow of the ideas."

SPOTLIGHT—PART II

7. **You wear two hats at MultiLingual Computing—that of a Publisher and the Owner. Describe a typical day at work for you.**

   A typical day includes:

   - Magazine work: consulting with our advertising department regarding sales and prospects; working with our subscription department on upcoming promotions; reading article submissions.
   - Conference work: planning upcoming conference programs and marketing efforts.
   - Other items: maintaining database website functionality (my programming background helps here); writing blog entries; technical work with the TAUS Data Association.

   Fortunately for me, the team at MultiLingual Computing is incredibly talented and self-motivated, so very little of my time is spent in actual "management" duties.

8. **Have you ever presented at technical writing learning sessions or annual conferences?**

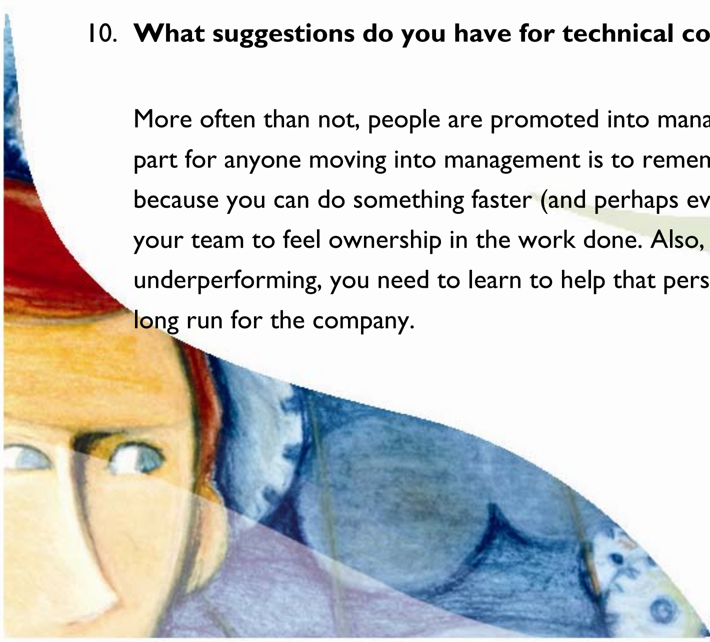
   I have presented sessions, but on localization itself and not on technical writing.

9. **Tell us something about your accomplishments.**

   I am most proud of helping to organize our local human rights task force, and of my present work with an anti-poverty organization. Nothing to do with technical writing per se, but these are the things I can honestly boast about!

10. **What suggestions do you have for technical communicators who wish to move into management?**

    More often than not, people are promoted into management because they can do their job very well. The hardest part for anyone moving into management is to remember to keep your hands off other people's work! Just because you can do something faster (and perhaps even better) doesn't mean you should. It is critical to allow your team to feel ownership in the work done. Also, if there is the case of a team member who is underperforming, you need to learn to help that person improve. This is only fair to the employee and best in the long run for the company.



"It is critical to allow your team to feel ownership in the work done. Also, if there is the case of a team member who is underperforming, you need to learn to help that person improve. This is only fair to the employee and best in the long run for the company."

SPOTLIGHT—PART II

11. **Do you blog? Who are your favorite bloggers?**

    I occasionally write blog entries on *Blogos*, MultiLingual's blog. (www.multilingualblog.com). Favorite bloggers include other writers on *Blogos*, John Yunker's *Global by Design* (www.globalbydesign.com), Common Sense Advisory's *Global Watchtower* (www.globalwatchtower.com), and Victor Alonso Lion's *The Globalization Rapporteur* (www.globalcontentstrategy.com).

12. **Have you interacted with technical communicators from a different geographical location? If yes, how has your experience been?**

    I have attended and met with members of tekom, the technical communication society in Germany. I am pleased to report that they have a much better concept of international communication than their counterparts at the Society for Technical Communication in the United States.

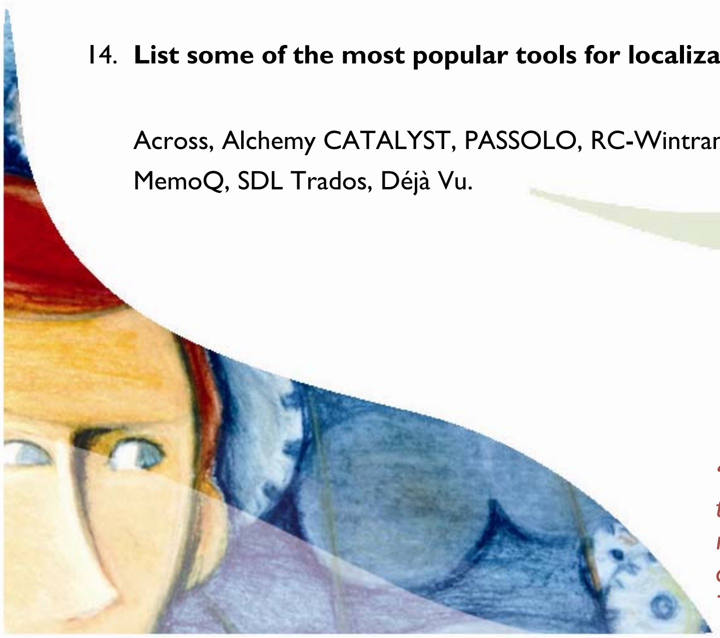
13. **What problems or challenges surround the localization and globalization industry these days?**

    Well, of course, the worldwide economic downturn is the main difficulty right now – for everyone!

    For localization and globalization specifically, one of the main issues is the rise of higher quality translation tools and how that technology affects the translator and the client. Where can the technology be used and where should it not be used? What is the pricing scheme for an increasingly technological solution to translations needs? How can we take advantage of this technology to stay in front of the incredible translation needs presented by the volume of data on the Web?

14. **List some of the most popular tools for localization and globalization.**

    Across, Alchemy CATALYST, PASSOLO, RC-Wintrans, Visual Localize, Heartsome, MultiTrans, SYSTRAN, MemoQ, SDL Trados, Déjà Vu.



"I have attended and met with members of tekom, the technical communication society in Germany. I am pleased to report that they have a much better concept of international communication than do their counterparts at the Society for Technical Communication in the United States."

SPOTLIGHT—PART II

15. **What localization and globalization tools are you using at MultiLingual Computing? Who are your major clients?**

    We do not have clients per se. We publish a magazine and organize conferences; therefore, we do not have clients or tools to address client needs.

16. **Do you read a lot of books? If yes, who are your favorite authors and why?**

    Yes! I usually alternate fiction, then nonfiction. Naming favorite authors is difficult, but some whom I always faithfully read are Anne Lamott, Marilynne Robinson, Simon Winchester, Barbara Kingsolver, Michael Pollan, and Malcolm Gladwell.

17. **Are you a member of any professional body like the STC?**

    MultiLingual is a member of GALA. I am a member of STC and ATA.

18. **Finally, any words of wisdom for fledgling technical communicators.**

    Sometimes your current project may seem unimportant, but to me one of the most crucial things we can do in the world today is increase quality communication in every place and in every way.

~ This interview was conducted by Rahul Prabhakar

"Sometimes your current project may seem unimportant, but to me one of the most crucial things we can do in the world today is increase quality communication in every place and in every way."

SPOTLIGHT—PART III

Interview with Parag Goel

Parag Goel manages the technical publications function at Novell, Bangalore. His team comprises individual documentation teams that are spread across different business units in the company. He is with Novell for more than 12 years, and heads two product development groups, besides leading the technical writing initiative. One of these development groups is responsible for delivering the protocol suites for NetWare and Open Enterprise Server (OES) product lines. The other group works purely on open source projects and focuses on building open source leadership in India and around the world. He can be contacted at pgoel@novell.com.

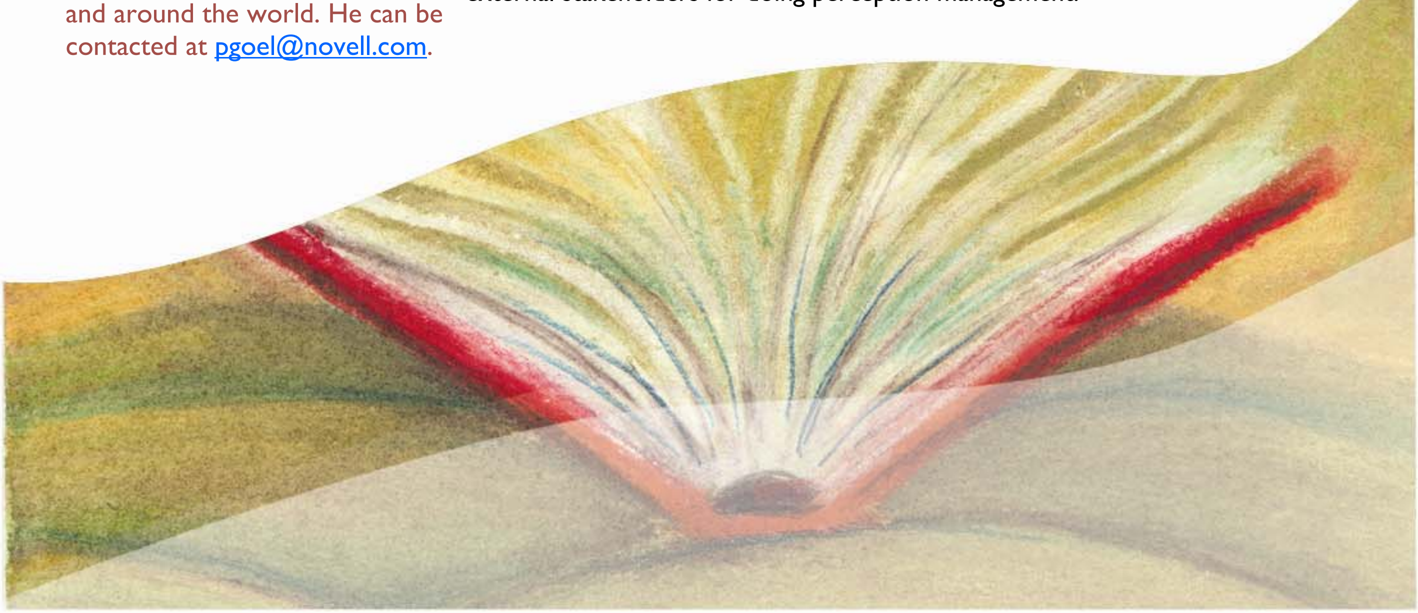
Managing documentation projects is not child's play. It requires synergy with the writing team, developers, end users, and other stakeholders. Documentation as a product is fundamentally different from software—it is more educative than existent. However, documentation project management is fundamentally similar to software project management.

In this interview, Parag Goel gets candid with Jyotsana Kitchloo about the documentation manager role.

Role of a documentation manager

A documentation manager is responsible for establishing the overall goals and documentation plans for his team. He is the one who enables the team to meet those goals. The documentation team often needs to interface with several other teams, like developers, QA, project management, and product management. This person needs to ensure that all the dependencies are identified and interlocked as part of the overall planning process.

The documentation manager also needs to set the right processes within the team in order to get good quality and on-time deliverables. He should ensure that members in his team are motivated and have a development plan chalked out that is aligned to their individual aspirations. Last but not least, he must be able to work well with external stakeholders for doing perception management.



SPOTLIGHT—PART III

Responsibility of a documentation manager

All documentation managers must work with their team to evolve the documentation processes, especially those that build a good tracking mechanism. There is plenty of scope for process innovation in the field of technical writing, given that the profession has not matured completely in the subcontinent.

Measurement criterion to ensure that the team follows proper documentation processes

The best way to measure that documentation processes are being followed in the team is to put them in a plan—in the form of a checklist or a milestone. Once they are put in the plan, it becomes easier to track the process. It may help to identify the top one or two areas for focus at any given time and make the documentation plan around those.

Identifying and developing high potential leaders as part of backup and succession planning

Identifying potential leaders is a continuous process. For leadership roles, most organizations prefer people who are not only meticulous in their work but also sincere towards their careers. They need to be good in planning their work and have to possess strong people leadership, especially towards influencing their peers.

Most importantly, they need to see themselves growing into a management role. If a good match of skills and interest is found, you know you have a potential leader in the team.

Developing them into a leader is often a slow and tedious process. Before beginning this process, it is important to have an open discussion with individual members about the career opportunities. It is critical to explain the process and to seek commitment from each member at this stage. Once this interlock is achieved, we need to give them the opportunities to demonstrate their leadership skills. It is useful to let the team know about this process so they can provide their support to the leader as he matures in the role. The person would need constant guidance and support throughout this process so it is important to meet frequently to review the progress.

Hiring and managing technical writers

There is an increased availability of talent over the last few years, especially in the senior roles. Candidates have a better understanding of the roles and positions they apply for. The hiring process has also evolved to be more effective. Overall, this field is seen as a mainstream career option now and we see a lot of talented people choosing technical writing over other options that they may have.

"Identifying potential leaders is a continuous process. For leadership roles, most organizations prefer people who are not only meticulous in their work but also sincere towards their career. They need to be good in planning their work and have to possess strong people leadership, especially towards influencing their peers."

SPOTLIGHT—PART III

Many technical writers today are skilled to manage their projects single-handedly so the role of a documentation manager is becoming more like a coach or a mentor who could help writers reach the next level. The stakeholders' expectations are rising over the years and the writers are getting good exposure through working with their peers in global teams. Due to this trend, several good writers are stepping into leadership roles where they are confident of taking up new challenges and drive global documentation teams.

Acquiring Special Skills

There is a growing need for development and writing teams to work together. As the complexities in the development projects increase, there is a corresponding increase in the documentation management complexities as well. The documentation managers should be able to handle these complexities. They cannot stay away from technologies and they need to build a reasonable depth there. These technical skills are critical in order to provide the right direction to the team and to do simple tasks like reviewing the documentation estimates.

There is a need to use metrics to track the progress and productivity of the documentation teams. This is something that is very basic for the development teams but yet to mature to that extent for the documentation teams. There is a growing need to do more with a fewer resources. Documentation managers can really add a lot of value for these aspects.

Challenges faced by documentation managers

The biggest challenge that most documentation managers continue to face these days is to build the technical/ domain skills and the technical writing skills in their teams—to the extent that everyone can be highly independent in their work. Both writers and managers should be able to match the technological skills of their development counterparts so that they can actively participate in technical discussions. On the other hand, they need to be highly skilled in technical writing. Many writers have a very good balance of these two but there are several others who need more attention.

Working on continuous mindset improvement and developing leadership across the team

It is important to set the accountability right, which clearly identifies the role of each member in the team. In a typical documentation team, the entire process is run and tracked by the team members. The team members do their own work estimation and planning, and make their commitments based these estimates.

"The biggest challenge that most documentation managers continue to face these days is to build the technical/ domain skills and the technical writing skills in their team—to the extent that everyone can be highly independent in their work. Both writers and managers should be able to match the technological skills of their development counterparts so that they can actively participate in technical discussions."

SPOTLIGHT—PART III

They work with their stakeholders directly to ensure that their plan is aligned with the development and QA plans. This ensures flexibility for changing the plan during the course of the project execution so long as they keep their stakeholders informed and bring in a sense of ownership and accountability of driving the work themselves.

Staying current on the latest trends in the technical writing industry

Informative sessions, tech-talks, trainings, peer reviews, and editorial reviews enable a good amount of knowledge sharing within the team. A lot of these techniques help in understanding the writing standards and processes better. We always look forward to participating in external forums like the STC conferences and learning sessions.

Team engagement and motivation

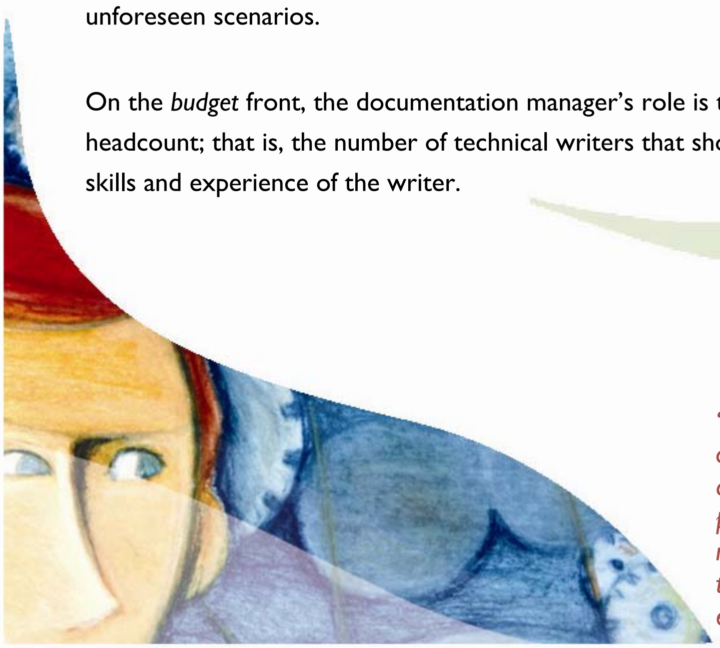
One of the ways to ensure engagement is by assigning challenging work that gives writers the opportunity to learn about new domains. Also, each writer must have a growth path that is mutually agreed upon between him and his manager. Good manager-to-writer rapport gives feelers on the team motivation. In addition, surveys and feedback exercises give clear indicators on the team's health.

Considering *quality*, *time*, and *budget* in a technical writing project

On the *quality* front, the documentation manager's role is to identify the process gaps and ways to fill them appropriately. A lot of this input comes from the team: either during the project execution or as part of the post-project analysis. A documentation manager's role is to facilitate a good and open discussion around these and take remedial actions.

On the *time* front, the documentation manager's role is to define the structure in which the team does the right estimation, planning, and tracking. He must ensure that the team has added sufficient cushion to take care of unforeseen scenarios.

On the *budget* front, the documentation manager's role is to plan resources. He should be able to determine the headcount; that is, the number of technical writers that should be a part of his documentation team—based purely on skills and experience of the writer.



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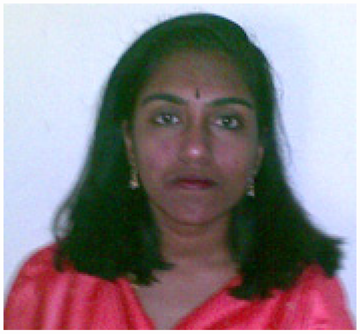
SPOTLIGHT—PART III

Selecting a documentation manager from a writing background

It would be ideal if the documentation manager grows from within the team; typically, someone with a strong writing background. This helps in tweaking several internal documentation processes since the manager has a much better context. However, there could be cases where managers do not have this advantage. In such cases, their strong management skills play an important role.

~ This interview was conducted by Jyotsana Kitchloo

"It would be ideal if the documentation manager grows from within the team; typically, someone with a strong writing background. This helps in tweaking several internal documentation processes since the manager has a much better context. However, there could be cases where managers do not have this advantage. In such cases, their strong management skills play an important role."



Shashi Prabha studied to become an Electronics and Communication engineer, but luck had better plans in store for her. She has a Bachelor of Technology degree from N. I. T. (formerly known as R. E. C.), Surathkal. After graduating, Shashi decided to expand her skills and knowledge by working as a faculty member at Aptech, Chennai. Later, she worked as a technical support executive at CLi3L e-services Limited, Bangalore. She built upon her experience by diversifying into technical writing—beginning with a brief stint at TCS, Bangalore. At present, Shashi works at Integra, Bangalore, where she is involved in the documentation of mobile telecommunication products. Her primary interest lies in API documentation.

WRITER OF THE MONTH

1. **Name**: Shashi Prabha

2. **Email Address**: shashi_prabha@yahoo.com

3. **Current Organization**: Integra Micro Software Services (P) Ltd., Bangalore

4. **Technical Writing Experience**: About 2 years

5. **Awards and distinctions in technical writing**: None so far. I firmly believe that the satisfaction of having delivered a quality document is a reward in itself. I consider every appreciation mail from a client equivalent to winning an award.

6. **Are you proactive on TWI? Do you read the group mails regularly?**

   Yes, I follow all the group mails on a regular basis. I've learnt a lot from TWI. However, I've never replied to any query posted to date.

7. **Do you believe in community service? How do you wish to contribute as a technical writer?**

   Yes, I do believe in community service. I help my colleagues at work, whenever possible. I hope to be more active on the listserv in future. I also like to maintain a work-life balance. My hobbies include reading novels, watching television, and cyber chatting.

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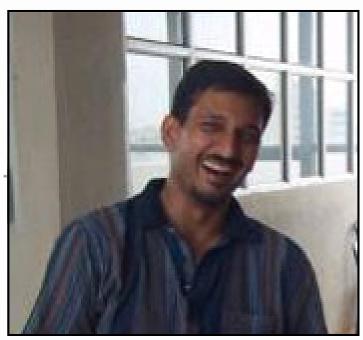

- Co-editor

TechCraft is one of India's leading eNewsletters on technical writing. It is our own way of communicating with the technical writing fraternity throughout the world. In case you wish to submit an article for the upcoming issues, email to rahulprabhakar@msn.com

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Since this forum is growing by the day, with new and experienced writers joining in from all walks of life, more and more people will definitely be benefited by this enriching experience.

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- Co-editor

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- Interview Coordinator (Parag Goel)

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