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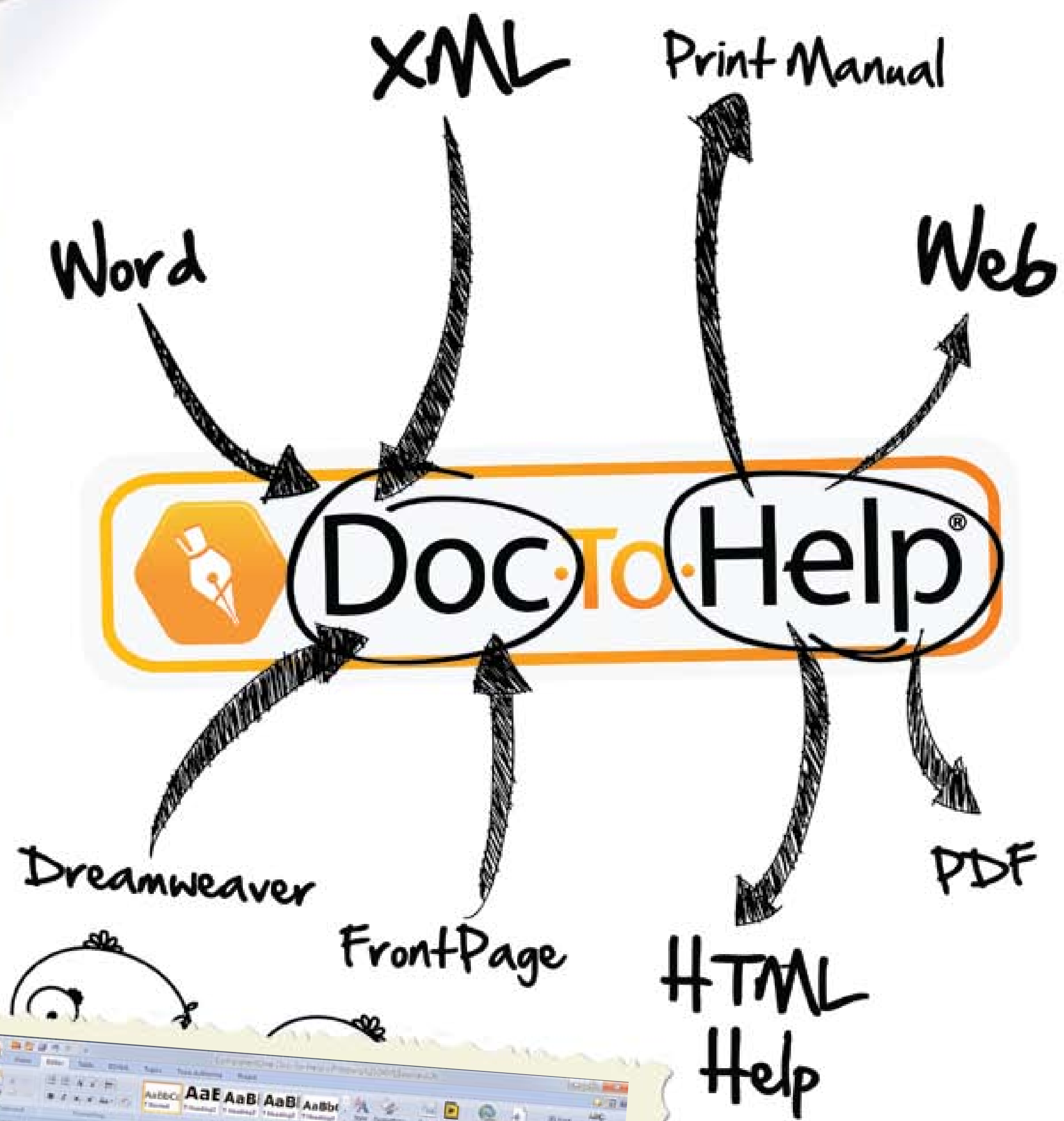

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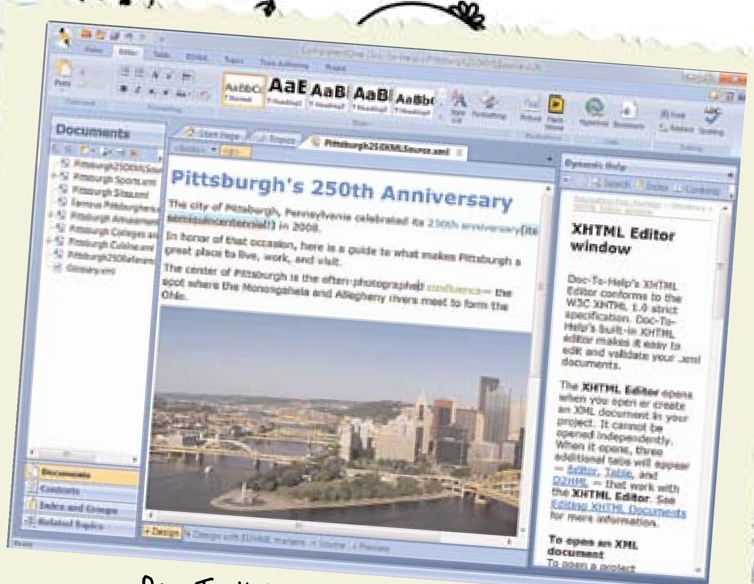

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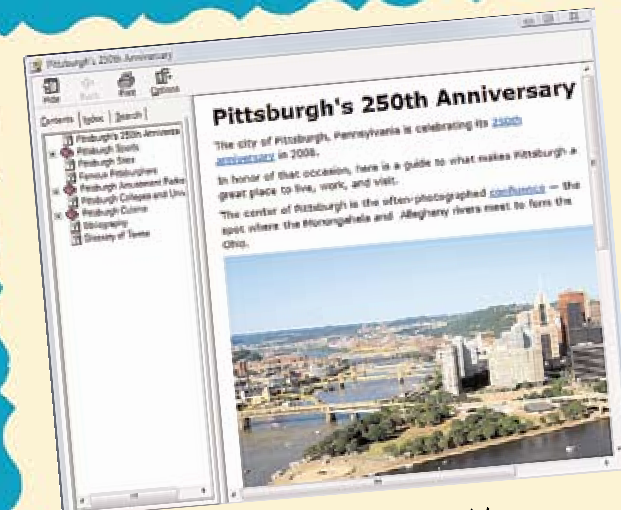

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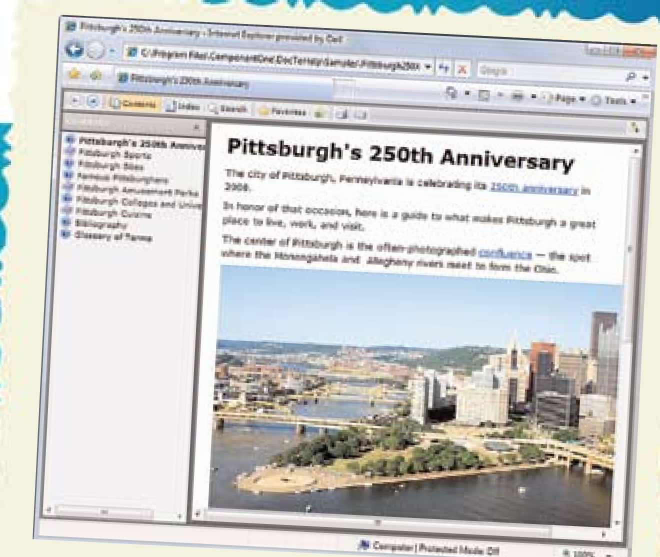

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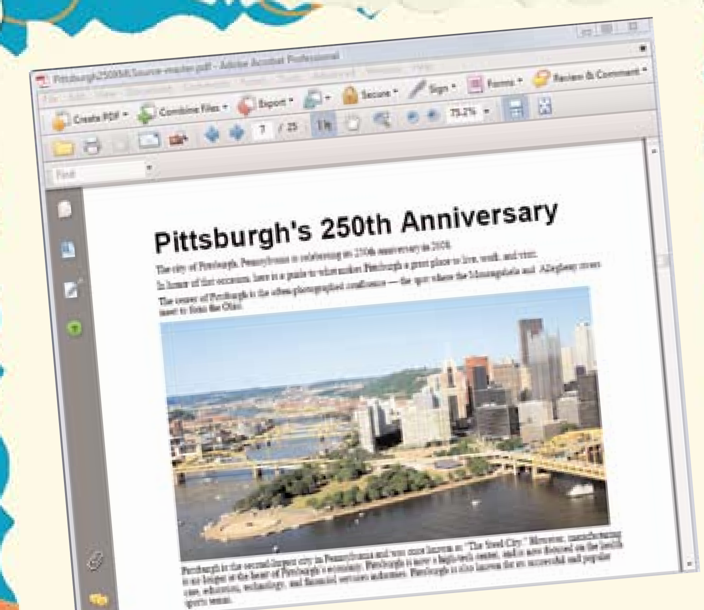

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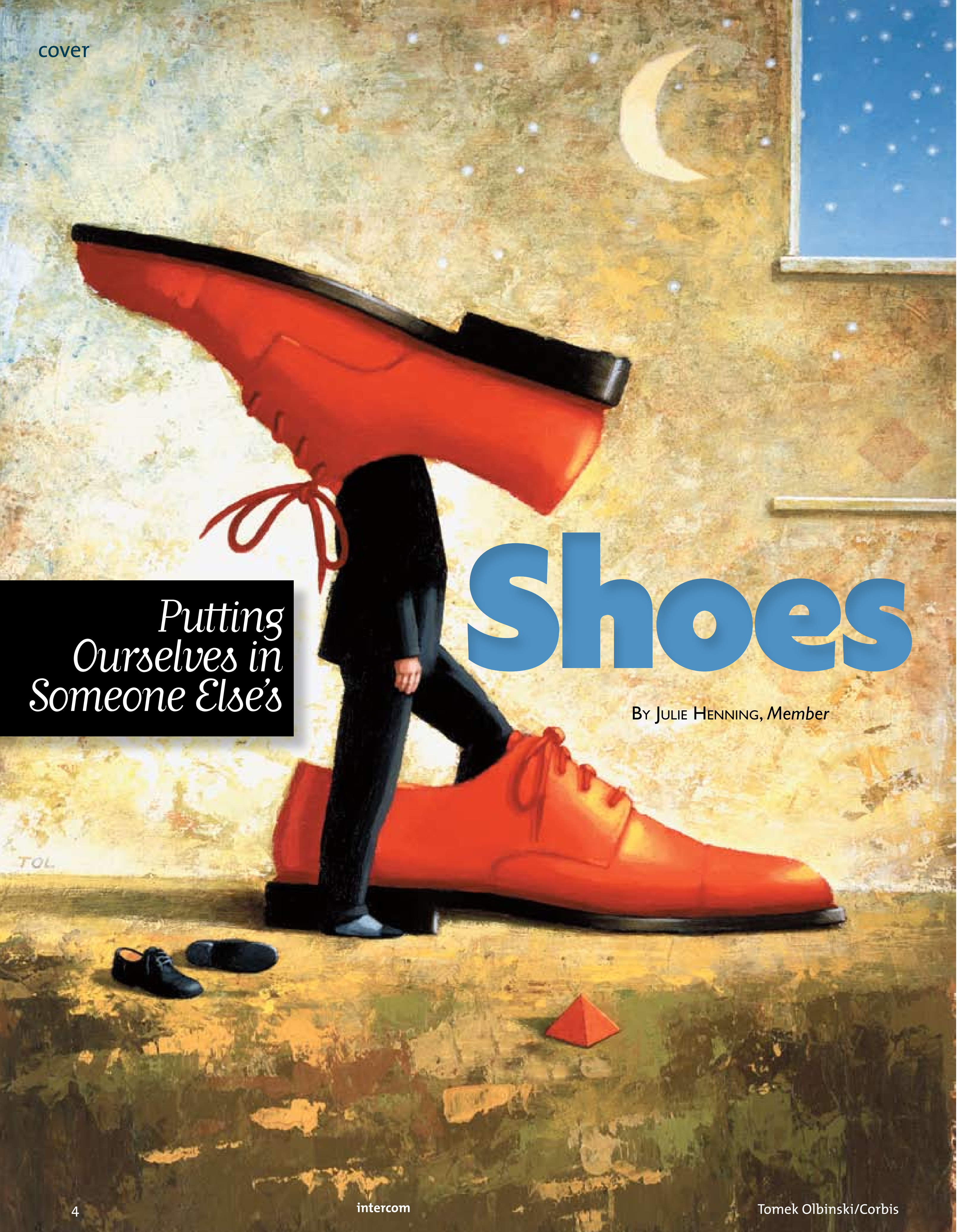

Putting Ourselves in Someone Else's Shoes

By Julie Henning, *Member*

Tomek Olbinski/Corbis

I have a confession. I'm a technical writer and I don't like to read user manuals. Especially the 300-page "book" that sits (barely used) in the glove box of my car. I'm not proud of this fact, but I did have an end-user epiphany this spring when the battery died. Alone on the highway, I sighed and immersed myself in the wonders of positive and negative terminals and pondered a three-dimensional drawing of what eventually led me to the trunk and to a battery hidden under the spare tire (!).

With user manual guilt fresh on my mind, I started asking myself why I typically don't read the manual when I propagate equivalently sized documents in my chosen profession as a writer in the medical device industry. To locate and recharge my car battery, all I really needed was a short document covering two topics: (1) locating the battery and (2) connecting the jumper cables. Ideally, for usability, durability, and increased longevity, the information could be on laminated paper. Perhaps instructions for a jump start could even be laminated right to the battery itself.

Moving Closer to the User Experience

Medical device technical writers have a common understanding in our profession. When people remind us that no one reads the manual, we take comfort in the fact that both the federal Food & Drug Administration and our competitors are diligently adding the pages to a file cabinet somewhere. Extrapolating the jumper cable experience to the larger technical writing industry, I propose an end-user analysis intervention.

One of the challenges facing medical device technical writers is the lack of "audience" interaction. The opportunities we have to observe procedures and interact with medical professionals are few, especially as companies are shrinking travel budgets and the laws regulating the frequency and nature of contact between device manufacturers and device users continue to grow in complexity and severity.

In my years writing and editing in both high-tech and low-tech industries, I have come to depend less on the "internal" departments (the individuals design-

Showing our value as it relates to the company's bottom line gives our profession increased credibility.

ing the product and the user interface) and more on the "external" departments (those people building components or interacting with the end user in a real-world environment). Bringing me out of my cube and putting me closer to the user experience has helped me to understand exactly what parts of the documentation are used (and, subsequently, how they are used), or if they are used at all.

I'm not advocating a mass exodus from the development process—quite the contrary. Often, a process of asking questions and "playing" with a product or application ultimately drives design changes that create a more user-centered and user-friendly product. Good questions to ask can simply start with:

- "Why do you…"
- "How do you…"
- "What do you…"
- "Where do you…"
- "When do you…"
- "Who do you…"

Take notes and, when you are finished, examine your paper for common themes and key words. Make an outline and follow it when creating small content chunks (or topics). If you have the opportunity, watch someone else use the product. Compare your experience with theirs and see if you can identify different ways to perform the same task. Listen for questions similar to yours and be sure to specifically address them within the documentation.

Thinking Like the Boss

Despite our good intentions for the end user and the production of the best possible user experience, we have to remember that change sometimes is slow. Writing and documentation trends come and go and being educated enough on them to make suggestions for improvement can make your job easier in the long run (not to mention, help you define and grow your career along the way). In my experience, proposing any change that either consumes man hours or budget dollars is best presented to key decision makers with data that supports one (or all) of the following areas:

- Number of documents affected
- Cost savings as a percentage of time or money (man hours, capital expenses, training costs, and/or document conversion fees)
- Impact to the business or customer experience

Companies with large budgets for documentation and translation can sometimes lose focus on the size and scope of the documents they produce. As documents grow in size and complexity, they become harder to manage and more expensive to change. Unless you are working directly with or for a documentation manager, waving the "red flag" of unmanageable documentation falls on your shoulders. As creators and lifetime "owners" of technical documentation, the responsibility for creating intelligent, affordable, and usable products falls within the realm of our expertise. Showing our value as it relates to the company's bottom line gives our profession increased credibility.

Coming Full Circle

For example, in my most recent job, I sat next to the one-person purchasing department. User manuals were being re-ordered and I was surprised to learn the cost to print and bind one copy was about $50. Maybe this is a drop in the bucket for a large company, but not for companies where the profit margin on one sale feeds travel budgets, payroll, and free coffee. I had a paradigm shift in my thoughts about document fulfillment (inventory vs. print on demand), electronic documentation (XML and PDF), content re-use, and content chunking.

The current user manual was more than 300 pages long and encompassed hardware, software, and other (sold separately) accessories. No single chapter could be easily extracted from the

document and used on its own (e.g., one chapter starts with assembling hardware, explains the human anatomy, and then brings the user into the software interface). My recommendation was to cut the manual apart and reassemble it into standalone chapters that could be used, distributed, and managed in a more streamlined way.

Perhaps this solution is not shocking to anyone who has been in the technical communications field longer than my 11 years. I do, however, continually find myself amazed by the fact that convoluted, lengthy documentation is the norm (not the exception). I wonder:

- Do most companies really know the cost of writing, printing, maintaining, translating, and distributing the documentation that accompanies a product or software program?
- Are writers given the opportunity to conduct both audience and content analysis on their documentation to really understand how and when it is being used (if at all)?
- Are writers effectively meeting the needs of their internal customers, including Marketing, Engineering, Sales, and Operations (re-using and re-purposing documentation to save costs and increase productivity)?
- What would motivate a customer to keep a 300-page user manual somewhere other than a drawer or glove box?

My hope is that, at some point, a company can identify all the activities that go into documentation (from project kickoff meetings all the way to legacy product support)—ultimately taking a proactive approach to controlling cost and improving customer satisfaction.

Too often, writers are introduced into a project in the eleventh hour, after key decisions (and budgets) have been made. Our work tends to fall between the cracks, somewhere after the R&D notebook but before the glossy marketing brochure. I believe many people with an engineering, marketing, or sales background do not like to write technical documentation (the task is daunting and, well, not exactly full of danger, adventure, or romance). Unfortunately, this approach to project management is not enabling technical writers to provide their expertise in usability or have a positive impact on customer service.

Walk the Walk and Talk the Talk

Who among us has ever read a user manual *without* critiquing it in our head? More often than not, we all find ourselves noting both cardinal sins and virtues in the documentation we use, such as:

- improvements in organization and content usability
- addition or expansion of indexes
- inconsistent use of terminology
- counterintuitive formatting
- unclear section headings
- poor editing
- attractive (or unattractive) page design
- innovative use of multimedia
- inappropriate or ineffective matching of content and medium (e.g., print, online, multimedia)
- images that support tutorials and other instructional text
- navigation

For example, a pet peeve of mine is a manual without an index, but I openly admit to having produced less-than-adequate indexes in my own work. The crutch "no one will even use this manual" is sometimes a path of least resistance, and I am guilty of taking it.

A character-building (and humbling) experience as a technical writer is to look at *our own writing* beyond the constraints of the style guide and the writing guidelines. Parallelism, correct grammar, and semantics are just as important as usability concerns such as, "Does the customer really need to see a screen shot of every user interface when they are most concerned with a key area inside the user interface?" and, "Do our how-to procedures really reflect the kinds of tasks that our users *actually* do?" Both are important, both have to be balanced—neither should be sacrificed in the name of the other.

We've all used documentation where one clearly has been sacrificed for the other, such as the 300-page manual in which typos and grammar errors won't be found—but neither will an index or an inviting, user-friendly page design. As technical writing professionals, we look at those manuals and wonder how many hours were spent executing the perfect edit—and wish that some of those hours had been diverted to indexing or template design. And we've seen too many flashy multimedia demos with poor punctuation and incorrect field labels in the on-screen text—leaving us to figure that the sound editing stage of the project must have been allowed to cut into proofreading time.

But we're not limited to what we find on our own. Even when technical writers don't have direct contact with their readers, there are other information sources all around our organizations if we're willing to do a little digging and a little talking. Collecting and tracking user feedback from such sources as

- electronic surveys performed by the marketing and/or business development groups,
- bug tracking systems used by the help desk,
- customer service databases that track orders, renewals, and service requests,
- course feedback surveys from the training group,
- topics listed in custom training requests,
- registration and/or attendance counts for webinars and conference sessions,
- field service logs written by technicians, and
- sales call reports from your sales team

is beneficial to writers as we plan documentation enhancements for the next launch, the next regulatory submission, or the next software release. Even when our readers don't give much thought to our existence in a company, they are still talking to us—just through different, indirect channels—about what they're doing, trying to do, wanting to learn how to do, or having trouble with.

Direct conversations with our coworkers in other departments are always a wealth of information—particularly the anecdotal knowledge gleaned from conversations with customers but never

> *Who among us has ever read a user manual without critiquing it in our head?*

documented. Also, there's the intuitive assimilations of observations that folks store in the backs of their minds that are not forgotten but somehow never find their way into emails to you. Marketing knows what web pages on the company site get visited the most frequently. Sales knows what bullet points, charts, and case studies in the marketing literature yields the most interest during conversations with prospects. Installation teams know what a user's first concerns are as soon as a new product is installed. For all these reasons, a cross-departmental content review may be a worthwhile activity from a branding perspective. For instance, does the content on the website match the brochures going out to customers? Do the technical specifications referenced by the field service engineers match the product datasheets? When discrepancies are identified, how is the information disseminated to the customer (e.g., FAQ web page, video cast, company newsletter, email blast, blog, case study, etc.)?

A former manager of mine once said she reads everything out loud before finalizing it. This exercise forces her to use inflection and read every word slowly. Another manager turns her documents on a right angle and examines them carefully for mistakes—literally, from a different perspective. If possible, the luxury of working on documentation over a period of days allows time to re-read the text for omissions and improvements.

Conducting a competitive analysis is another way to critically examine your company's documentation methodologies. That is, if you can identify your competitors and analyze how *they* document products and/or software, you can see what you are "up against" in terms of trends and technology. This analysis can also help make a case for infrastructure upgrades and professional development during goal-setting and performance evaluations. Is it possible your writing department is wearing flip flops when they really need army boots?

Writers as a Commodity

When writing departments reach a certain size, a primary responsibility of the technical communications department manager is to support and balance the needs of the internal clients and the needs of the writing department (including workloads, scope creep, and offering professional development and customer-interaction opportunities). But what happens when companies do not have internal writing services at their disposal?

Consider the position of startup or virtual companies that have only a handful of employees. Without a description of their products and services or a clearly written value proposition to set them apart from their competition, these companies are at a disadvantage. Specifically, new customers and investors may not have a strong concept of what the company can do for them. Enter another opportunity for an end-user analysis intervention.

Budgets for writing in companies where the owner is usually not even receiving a paycheck are small—if they exist at all. Keeping that in mind, independent technical writers offer value in that we are trained in both content and audience analysis and can offer solutions based on price, need, and purpose. Our job is to efficiently write, in a shorter time frame and from an outside perspective, what these companies cannot produce themselves. For example, we can often turn lengthy technical documentation into concise product descriptions that are free of jargon and industry-specific acronyms, while addressing the pain points of the customer.

The key to justifying our writing services involves thinking about our writing as an activity that is necessary to the long-term growth of the company. This approach to writing strengthens our ability to propose different levels or "packages" of deliverables. For example,

Level 1 includes existing content analysis, audience analysis, usability testing, and product documentation. Level 2 includes brochure copy, web content, and datasheets. Level 3 includes training materials, engineering documentation, and online help. And so on.

Charging a per-hour or a per-project rate for documentation then allows a company to track their investment and accurately budget for future writing needs. Ultimately, as the company expands, the justification for a full-time writer already exists. And, the company can better identify their writing needs and articulate what types of skills and experience they are looking for in a writing candidate.

But, how do writers use the car battery example when they are starting from the ground up? Starting with no documentation can be overwhelming unless you can look at the project as an opportunity to think from the end user's perspective.

Ask yourself these questions as a starting point:

1. When would I need documentation?
2. How would I use the documentation? How long would I spend reading it?
3. How motivated would I be to seek out documentation? Would I just pick up the phone and call customer service?
4. Where would I store the documentation? Would it be readily available when I needed it?
5. Would I look for a manual or would I go to the company website?
6. How complicated is the product? Would I immediately throw away the manual when the product arrived?

There are certainly other questions to add to the list, but the general concept is to put yourself in the customer's shoes and think about your own experience with the product. Some companies (especially those in the medical device and pharmaceutical industries) are mandated by law to provide documentation. Others provide it as supplemental material. Help your client or employer identify the customer experience and then work within the writing budget to best help meet everyone's needs.

And last (but certainly not least), you are building a portfolio of experiences along with establishing your credibility. Before beginning a project, have metrics (and your résumé) on the brain. Consider these statements:

- Reduced the amount of redundant language by X percent.
- Reduced the amount of inconsistent terminology usage by X percent.
- Increased website traffic by X percent.
- Saved X dollars in translation costs.
- Implemented on-demand printing and electronic documentation, resulting in budget savings of X dollars.

Although often you can't talk directly to your users, networking with other technical writers and hearing what conclusions they're drawing about user experiences will ultimately benefit all users in some way. Even when you're talking about radically different products, the fundamentals of a good user experience are the same. For these reasons, it's important that you surround yourself with a supportive group of experienced and novice writers, work together, and mentor each other so that you can grow and identify areas of development based on everyone's successes and failures. Share and collaborate ideas; the most isolated of us can still find support and professional camaraderie through email and online discussion boards and forums. And, finally, attend conventions to network and exchange ideas—but don't forget your jumper cables!

Suggested Reading

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