Acheiving Success, continued from page 9

within the final system. This may also include roles such as approver and librarian. Do not allow the technological challenges of the Intranet to limit this stage. Try to minimize the impact of the solution on each role, as this maximizes the chance of the system being kept current and used. Try to divorce the authoring tools from the delivery tools. Lastly, remember that when choosing software, ask for and take up client references from organizations that have been using the software for at least a year.

Edward D.J. Frost is a member of the Boston Chapter of STC and the Policies and Procedures SIG. Through 17 years work with Ringwood Software, he has helped with online documentation implementation involving 10 to 50,000 users.

Conference Plans, continued from page 1

- Getting into P&P Documentation: How Do I Do It? (for technical-writing career changers)
- Making a P&P Writer Out of a Non-P&P Writer: Engineering the Transition
- Formatting Hardcopy and Web-Based P&P Documents: Enhancing Readability (possibly joint with Usability SIG)
- The Role of ISO Standards in P&P Documentation (possibly joint with Quality SIG)
- P&P Documentation and the Lone Writer (possibly joint with Lone Writer SIG)
- P&P Documentation and the Independent Contractor/Consultant (possibly joint with CIC SIG)
- The Politics of P&P Documentation
- Building Value into a P&P Job

Formats for presentation include progression, panel discussion, paper presentation and workshop. This is your SIG, and we encourage you to participate. It's really quite easy and a lot of fun. The SIG will be working on proposals until late July. Help in this area is also needed and appreciated. If you are interested, please contact Audrey C. Kessler (audck@aol.com) or Kathy Craddock (dizsuitsme@aol.com) for more information.

If You Write It, continued from page 3

Every brick counts. And not just the materials it is made from. Placement counts as well. Strong bricks poorly placed won't be of much benefit if no one bothers to open the door and look inside.

Audrey Cielinski Kessler is the owner of The Write Hand of Ohio, a writing, editing, desktop publishing and Web site design company in Kent, Ohio; a senior member of the Northeast Ohio chapter of STC; and manager of the Policies and Procedures SIG.

The mission of the Policies and Procedures special interest group is to assist STC members in developing, implementing, and managing policies and procedures communication through educational and networking opportunities, STC conference sessions and publications, and communication with other STC SIGs and professional organizations in areas of common interest.

Steps & Specs
Kathy Craddock, Editor
103 Blueridge Rd.
Carrboro, NC 27510

Prsrt Std
US Postage
Paid
Akron OH
Permit #286

Vol. 7/ No. 2/ June 2001

Steps&Specs

The newsletter of the STC Policies and Procedures Special Interest Group

P&P SIG Plans for 49th Annual Conference

Compiled by Audrey C. Kessler

The theme for the 49th Annual Conference is "Leading the Technical Communication Revolution." For more information go to http://www.stc.org/PDF_Files/49th_Call4.pdf

The Policies and Procedures SIG is already gearing up for this conference, to be held in Nashville, Tennessee, May 5-8, 2002. In past years, the SIG has had several proposals accepted and we're always interested in adding others. The SIG usually presents a progression (involving as many as nine presenters) and a panel discussion (involving as many as five presenters). We are looking for people who are interested in presenting at the next conference as part of a group (i.e., progression, panel discussion, or paper presentation). However, you are welcome and invited to submit your own proposal.

SIG members have developed the following list of possible session topics. Other suggestions are definitely welcome. Proposals for conference sessions are due to the Society office by August.
Here is the list of possible topics:

- Industry-specific procedures (e.g., banking, medical; this session could be set up like progression tables but attendees don't switch; each table is a mini panel with one host)
- Trends in P&P (panel or progression)
- P&P case studies (panel)
- Indexing P&Ps (possibly joint with Indexing SIG)
- Freelancing P&P Documentation (possibly joint with CIC SIG)
- The Procedure Document Lifecycle
- The Policy Document Lifecycle
- Illustrating Procedures
- Creating/Designing Procedure Graphics/Illustrations That Work
- Techniques for Writing Procedures for the Nonprocedure Writer (workshop, panel discussion or progression presentation if enough presenters)
- Working Effectively with P&P SMEs (case studies)
- Legal Issues in P&P Documentation
- Writing Legal or Quasilegal Procedures

Conference Plans, continued on page 10

In This Issue:

P&P SIG Plans for 49th Annual Conference 1
From the Editor's Desk 2
If You Write It, They Will Read It -- Maybe 3
Member Profile......................................3
Turning a Skeptic into an Online Reference Champion..........................4
Manager's Column..............................4
Policies and Procedures Writing: It's Not Just for Software and Hardware Manuals Anymore 5
Trends In Policies and Procedures Communication...................................6
Achieving Success with Intranet-Based Online Documentation 6
Strangers in a Strange Land: Policies and Procedures as Part of the Training Function 7
Single Sourcing in Spite of Ourselves..8

Chicago's skyline taken from Navy Pier. Photo by K. Craddock

Steps & Specs is published quarterly by the Society for Technical Communication's Policies and Procedures Special Interest Group.

Editing/Design/Layout

Kathy Craddock
919/966-7904 (office)
919/968-6489 (home)
dizsuitsme@aol.com

P&P SIG Team Leaders

Audrey Cielinski Kessler, SIG Manager and Listserv
330/677-8598 (office & fax)
330/677-1168 (home)
audck@aol.com

Linda Charles, Listserv Archiving
416/964-2417 (home)
416/445-8899 ext. 3117 (work)
lcharles@interlog.com

Candie McKee, Membership
818/557-0805
(home/office/fax)
candie_mckee@yahoo.com

Luette Arrowsmith, Webmaster
708/681-4595 (home)
luette_a@hotmail.com

Kathy Craddock, Special Projects
919/966-7904 (office)
919/968-6489 (home)
dizsuitsme@aol.com

Raymond E. Urgo, Immediate Past Manager and Information Request Coordinator
323/957-9317 (office)
rurgo@aol.com

Send contributions to:
Kathy Craddock
103 Blueridge Rd.
Carrboro, NC 27510
dizsuitsme@aol.com

Society for Technical Communication
901 N. Stuart Street, Suite 904
Arlington, VA 22203-1822
703/522-4114 (office)
703/522-2075 (fax)
http://www.stc.org

From the Editor's Desk

By Kathy Craddock

Summers in the Triangle area of North Carolina (Raleigh, Durham and Chapel Hill) vary from day to day. These days can be hot and humid or more moderate and breezy. Thunderstorms threaten often, flower and vegetable gardens are growing like crazy with new sights and smells daily, and recreational activities are many and varied. You are probably asking, "What does that have to do with this quarter's newsletter?" Granted, not a lot, except this issue of *Steps & Specs* is full of a variety of information related to the Society's 48th Annual Conference.

Many of the Policies and Procedures SIG conference participants answered the call to submit their presentations or summaries of them, and you will find them inside. We hope that this provides those who could not attend the conference an idea of the topics that were discussed.

In this issue you also will find the quarterly manager's report, information on the 48th Annual Conference wrap-up and, as always, opportunities to become involved in the SIG through volunteer leadership and participation in the Society's annual conference. There are many possibilities from which to choose.

Also in this issue we introduce Linda Charles in our member profile column. Linda has volunteered to work with Audrey C. Kessler and the SIG's Listserv.

I'm pleased to report that the SIG was well represented in Chicago this year, and it was great to finally put some faces to names. Samples of our newsletter and brochure were available to conference attendees. The SIG luncheon was a huge success. We filled our designated tables and had to occupy another one. This was the largest turnout ever for the SIG Networking luncheon.

Our membership continues to grow and, with that, our talents and knowledge grow too. I would encourage you to take a look at the opportunities for involvement next year as well as the ongoing need for volunteers to keep the SIG running smoothly. See what interests you, where your skills fit, and consider volunteering.

Enjoy your summer and this issue of *Steps & Specs*.

Kathy Craddock

SIG members (from left to right) Sue Wolford, Audrey C. Kessler, Cheryl Holquist, Terri Avenizes and Kathryn Vivirito gather at the P&P SIG business meeting in Chicago to discuss the direction the SIG will take in the next fiscal year.
Photo by K. Craddock

Strangers, continued from page 7

- Build professional relationships with policy makers and subject-matter experts
- Consult for other departments on projects affecting corporate policies and procedures
- Conduct procedure analyses
- Conduct audience and task analyses
- Perform usability studies to improve acceptance of policies and procedures
- Organize information for accessibility and ease of use
- Write clear, concise policies and procedures to improve compliance

Next steps

Our short-term objective for moving us toward our ideal situation is to develop a marketing strategy to promote our skills as policies and procedures analysts. Our target will be policy makers in all functional areas.

Summary

If you are questioning your role in your organization, you have at least two choices:

- You can internalize your questions and frustrations and, because you are not actively seeking answers or change, you can either accept being unhappy (therapy might help), or leave
- You can constructively use the energy of your frustration: Reject, analyze, and question the status quo to find out why things are the way they are, and if they have to stay that way. With this new understanding, you will have the basis for constructing a positive outcome for yourself and your organization

Lallie Hayes has been with Home Depot for 11 years. She writes standard operating procedures for operational areas. Roberta Heinlein has been with Home Depot for two years. She writes standard operating procedures for human resource.

Acheiving Success, continued from page 6

benefit in a degree of standardization. Most corporate documentation today is witten in Microsoft Word, and many successful systems allow authors to continue to write in Word where possible. This will minimize the "ramp-up" time for the authors and help insulate the system from staff turnover in authoring groups. Similarly, the most successful systems employ some form of automatic pre-indexing where every word of every document is inverted to provide for full-text retrieval searching. This relieves authors from the need to second-guess which words are worthy of being searched for. Choosing software that is capable of converting the source documents from their original format to the desired delivery format minimizes project impact on busy authors.

Readers

User friendliness is the most common must-have requirement of online documentation systems. It is useful to distinguish between what is easy for an expert user who repeatedly uses the system and what is easy for an infrequent user. Typically an online documentation user is an infrequent visitor to the system. Technologically such "whiz-bang" systems often fall into disuse because they take too long to learn. Successful systems follow the example of bank ATM machines: Keep the interface minimal and simple. If there isn't much to learn, then there isn't much for the user to forget between the first interaction with the system and the next. If the first interaction with the system is positive, users are encouraged to return. This is an accumulating effect. The same is true of systems that are complex to use. Users are quickly discouraged as well as encouraged.

IT professionals

IT professionals are often the least considered role in an online documentation system. Webmasters are usually overworked and uninterested in getting the formatting of large quantities of material presented for online delivery. First, translation into HTML/XML is a technical task. Even though the usability of translation tools has come a long way in the last two years, few authors and Webmasters are finding that documents are Web-ready without some "tidying-up" by hand. Second, the process of chunking large documents into Web page-sized segments is a labor-intensive task that very few Web authoring tools do well. Third, there is the problem of link management. This has proved to be the most significant problem for the IT professional supporting an online documentation implementation. After the initial rollout, documents are revised, some are deleted, others are added and others split or merged.

The resulting task of breaking, remaking and testing the hundreds or thousands of hypertext links is often called a "nightmare." Indeed the term "Web" is appropriate. The most successful systems minimize these three problems and create a system that is easy for the Webmaster to administer and maintain. Consider choosing a documentation database that is not tied to current Web technologies. If possible, separate the authoring format from the display format by choosing a system that renders the documents from original into delivered format. It was only six years ago that SGML was being hailed as the future for online documentation. Then came the World Wide Web with HTML. Now it is XML. What will it be in six year's time? In the mean-time the favorite authoring tool has remained the standard word processor for about the last 10 years. The shift from Word Perfect to Word has been far less revolutionary than the change in delivery technologies. This seems likely to be the case for the next 10 years.

Putting it all together

The model online documentation project starts with building a requirements list that provides simplicity for each role

Acheiving Success, continued on page 10

Single Sourcing in Spite of Ourselves

By Sue Wolford

Presenter's Note: My original topic was titled "Using Single Sourcing to Create Procedural Uniformity." While this is still our goal, we haven't achieved this yet. Instead, I have addressed the issues facing us as we prepare for the single-sourcing process.

For Chase Manhattan Mortgage Corp., single sourcing is part of our process to get all our procedures online for the first time. Our primary goal is to get the procedures in an online format that is appealing and fits within the structure provided for us by our technology group. Our secondary goal is to reuse as much information as possible.

We're charged with documenting:

- Processes for the end user and the auditor in a heavily regulated field
- System usage of all corporate systems
- Rules and regulations that bind us to our operation

In starting to put information online, we began in the areas with the highest customer impact: customer service and collections. We found a number of overlapping processes in the development of documents. For example, both departments waive fees, reverse charges, and deal with delinquent taxes and insurances. Several opportunities to "write once, use many" fell into our laps. Our approach is to write in micro-documents, where only one phase of a process is covered in each segment. Then, we write the process generically without any references to the departments performing the process, (which for Word) we looked for ways to use this to our advantage.

Using the tools available, we decided to make the most of the situation and created a template and a set of icons consisting of Wingdings and Webdings that serve as cues for the reader. A pointing finger leads the reader to additional information, an open book appears wherever policy information is needed and a green telephone shows the reader where he can find scripted text for the customer.

What we have not figured out yet is the document management piece. We are scheduled to use domino.doc to deliver information to the Chase intranet.

Given the types of information we cover and the repeated explanations of these, with an innovative approach to the information we can successfully single source the information with limited tools. Through sheer determination, we are going to put the concept of single sourcing to work for us.

If you want to know how this process actually works, corner me at next year's conference in Nashville.

Sue Wolford currently serves as the policies and procedures manager at Chase Manhattan Mortgage Corp. in Columbus, Ohio. Wolford is a member of the Central Ohio chapter of STC, where she has served as public relations chair, vice president, president, and now immediate past president.

Manger's Column, continued from page 4

publication. And, as always, authors are needed to write articles of all lengths and on virtually any topic related to policy and procedure communication. One suggestion discussed at the business meeting was case studies, such as how an organization overcame a problem with a project or how needed information was obtained from reluctant subject-matter experts. If you even have just a tip or two on how to work smarter or more efficiently or how you dealt with an annoying software or hardware problem while preparing a policy or procedure document, your contribution would be of value to your fellow SIG members. So I encourage everyone to at least consider being a newsletter contributor.

As a SIG we have much to be proud of and much to look forward to in the future. And the future is ours. We need only to grasp it. We can go far and achieve so much.

Audrey Cielinski Kessler is the owner of The Write Hand of Ohio, a writing, editing, desktop publising and Web site design company in Kent, Ohio; a senior member of the Northeast Ohio chapter of STC, and manager of the Policies and Procedures SIG.

Member Profile, continued from page 3

*S&S:*What are the key talents, interests, education and personality characteristics of a successful P&P communicator?

LC: Although I'm not currently in the field, I would think that you would have to be very organized and analytical to be successful in this field. Also, aside from the ability to present information in a structured and logical format, good research skills and the ability to communicate effectively with a variety of people would be important.

S&S: Anything else you would like to share with us?

LC: My background is a little scattered. I have an honors degree in biochemistry and will earn a technical communications certificate at the end of this month. I belong to the Toronto, Ontario, Canada, chapter of STC. My personal interests include dance, (I take jazz classes), and I hope to start doing some freelance writing for a new regional newpaper that is coming out this year.

If You Write It, They Will Read It--Maybe

By Audrey Cielinski Kessler

As with people, looks aren't everything, but appearance and presentation do matter. And it's also true of policy and procedure documents. The physical appearance of a document—both the front cover and all the pages that follow—can affect the reader's desire to use the document and his ability to find the information he needs or wants.

If the document is placed on a shelf, hereafter forgotten, creation of the document was a wasted effort. Whatever jewels of information the author packed within the pages are of little value. The goal is to create documents that not only contain technically correct and useful information but also are visually appealing, easy to read and make finding needed information a simple task.
If your document is the only game in town, maybe you can get away with a less than appealing document—in terms of either content or appearance, or both. But that's not likely to be the case.

Chances are there are other resources—maybe even lots of them—that someone can use to get the same information. So you will want your document to stand out in the crowd. What you don't want is for it to get lost in the shuffle because it's bland and boring or just plain uninteresting to look at. Nor do you want it to stick out because it's so visually unappealing that no one bothers to even pick it up, thinking that maybe you really can judge a book by its cover. The problem is that many people do judge a book first by its cover. If their interest is piqued, only then are they likely to delve into the content. And content is the main purpose of your documents. You wouldn't be writing it if you didn't have something important to say—something that the reader needs to know to do his job or to avoid an accident or even a tragedy. You may write it, but they won't necessarily read it.

So how do you ensure that potential readers get beyond the cover and into the meat of the document? The appropriate use and placement of design elements and text that gives the reader a clear visual and textual image of the document's content is one way. It requires the use of words in titles and subtitles that are precise and pertinent. And it requires the use of design elements that give the reader at least a hint at first glance what the document is all about.

Most people are busy--very busy. And they want information quickly. So they're not likely to take a lot of time trying to decipher what it is you are trying to convey through your document's cover design, much less the text within it. If you don't draw the reader in here, he may never even open the book, and your time has been wasted.

Now that you have hooked the reader enough to get him to at least open the document, your job doesn't end there. The content, also, needs to be visually appealing as well as clearly written. As with the cover, design and organization of the content are critical to making the material inviting to the reader. Using too many different fonts, for example, can befuddle and distract a reader from reading and comprehending what you have to say. Also problematic is the use of more than about three numbered levels, such as 1.1.2.4.4. It's simply overkill. Then there are the poorly placed tables, graphs and illustrations or graphic elements such as these that lack pertinent information to be able to stand alone without the reader having to dig through paragraphs of text to find that missing information.

It's like the horse being brought to the water. You may be able to get it there, but you can't make it drink. Or erecting a shopping mall with stores that no one particularly wants. You may have built it, but they won't necessarily come. The same is true when crafting a document.

If You Write It, continued on page 10

Member Profile: Linda Charles

By Kathy Craddock

This quarter, Steps & Specs *profiles Linda Charles. Charles has volunteered to work with Audrey C. Kessler and the Listserv team. Charles will be responsible for archiving posts. The P&P SIG is glad to have Linda as part of the leadership team.*

S&S: How did you become involved in P&P communication? Was it by design or default (by accident)?

LC: I signed up for the P&P SIG when I became a member of the STC.

S&S: Briefly describe your background for our readers.

LC: I'm actually new to the field of technical communications. I'm currently completing my certificate at George Brown College in Toronto, Ontario, Canada.

S&S: Where do you work currently, and what role do you serve?

LC: I don't currently work in the field of technical communications. I'm an associate consultant with a benefits and pension consulting firm.

S&S: What do you say when someone asks you, "What do you do?"

LC: My specific department provides administrative and consulting services for the pension plans and savings plans of a variety of corporate clients.

S&S: What makes you a good P&P communicator?

LC: I hope to become one at some point!

Member Profile, continued on page 8

Turning a Skeptic into an Online Reference Champion

By Teeoh Otten

My topic was about building relationships with subject matter experts (SMEs) at the 48th Annual Conference. In order to create accurate documentation that actually gets used. Common consulting processes to build the relationship are used after processes.

A perception of technical writers is that they are like other "techy folks" – they just sit in their cubicles and do their own thing. I, however, believe that to really do a good job, the writer needs to build a relationship with the experts. Many times the technical writer is counting on the project leader, supervisor or team leader to do all the work in the relationship area.

My presentation consisted of three parts:

- Identifying who the SMEs are and how they would see themselves in relation to their expertise and their position within the organization where they work
- Reviewing some reasons why the SMEs might not be on your side in creating online reference material
- Sharing tactics I've found useful in overcoming resistance from SMEs and building a good working relationship.

I also presented the premise that if the SMEs do not support the online material, the people the SMEs support don't have much reason to use it either. Also, maintenance may be spotty at best or not happen at all. Additionally, you may end up with only partially accurate information if the SMEs don't do a good job reviewing the content.

I presented information on who and what SMEs may be in an organization, how they see themselves, and how they think others in their organization view them and their responsibilities.

The session then covered five common reasons why SMEs may not be supporting the process and finished with a tactic or two for each of the five reasons.

A more detailed overview of my session can be found on the Society's Website at http://www.stc.org/48thConf/48th_post.html Scroll through the list of authors until you find my name and the link to the handout.

Teeoh Otten is a senior designer at American Express Financial Advisors.

Reminders

Letters to the editor are always welcome. Send your comments to:

Kathy Craddock
Steps & Specs Editor
103 Blueridge Road
Carrboro, NC 27510

The deadline for articles for the September issue of ***Steps & Specs*** is August 15.

E-mail Kathy at dizsuitsme@aol.com with your contributions.

Manager's Column: Thoughts on Another Year

By Audrey Cielinski Kessler

As another fiscal year draws to a close, it is appropriate to take stock of where we have been and where we hope to be in the future. Our membership continues to grow, at one point numbering more than 1,000 policy and procedure professionals. The number has dipped some following dues-renewal time, but I'm confident the membership total will continue to rise. My goal is to reach a sustainable membership of at least 1,000. I believe we can achieve this, in part, because of the SIG's increased visibility among technical communicators in general and at the Society's annual conference.

At this year's conference, the SIG sponsored two sessions: a panel discussion and a progression. Both were well attended. For next year, I would like to increase the SIG's presence at the annual conference with sponsorship of at least one additional panel. This is where you, as a P&P SIG member, can play an active role in helping to meet this goal. I have prepared a list of possible presentation topics (see related story, p. 1) that can be developed as either panels or progression topics. Some of these were suggested and discussed briefly at the SIG business meeting on Tuesday morning during this year's conference.

If you have never presented at an STC conference, the progression format is a good (and easy) way to get started, and I urge you to consider this option. If you do not want to participate yourself but know of someone knowledgeable in one of the topic areas who might be willing to be a conference presenter, you can help by sending me (at audck@aol.com or 330/677-8598) their name and contact information. If you have a topic idea, please send that along as well.

The SIG's newsletter has been growing in size and substance over the past two issues, thanks to the efforts of editor Kathy Craddock. As you probably know, the front page now sports a color masthead, and the inside is packed with lots of useful information presented in a readable fashion. In this issue, we have included some black-and-white photos to enhance the visual appeal of the

Manager's Column, continued on page 8

Strangers in a Strange Land: Policies and Procedures as Part of the Training Function

By Lallie Hayes and Roberta Heinlein

Introduction

Location, location, location. When you are buying a house, real estate agents tell you everything depends on where the house is located. Our "life locations" have an effect on how we feel about who we are and what we do. One of these life locations is where we are located in our organizations. As a writer of policies and procedures in your organization, do you ever feel that you are a "stranger in a strange land"? Do you ever feel just a little dysfunctional? Out of touch with reality? Iinvisible? Ready for some **therapy**?

Evolution of our presentation

During the research for, and development of our presentation, we have turned 180 degrees from our original proposal.

In July 2000, we submitted this proposal: We are synergistically aligned with the objectives of the Training Department, sharing resources and jointly conducting analyses.

Here we are in May 2001 saying it probably doesn't make sense organizationally for policies and procedures to be in the Training Department.

As we talked to managers and peers, we found no consensus for the logical location of the policies and procedures function within the organization. We discovered that the role of the policies and procedures function has evolved according to who was available to handle the function and the personality traits of the person doing the function. Our current location is the legacy of these organizational decisions.

These conversations led us to the following questions:

- Where should policies and procedures fit in the organization?
- What can we do to affect the existing organization that would enhance our ability as technical communicators to provide value and grow professionally?

How our function is organized

Within our company, our group, the Reference Team, is one of six teams within the Training Department, which is part of the Human Resources (HR) Department. The HR Department, which is organizationally at the same level as functional departments such as Advertising, Finance and Information Services, comprises approximately 10 departments, including Training.

Our group is responsible for working with functional departments to maintain and publish corporate policies and procedures. Although our group often goes outside our organizational framework to get information, we have no formal reporting lines outside of our department.

Issues

The questions we asked as we prepared our presentation raised the following issues related to the effectiveness of developing policies and procedures within our organizational structure:

- We sometimes serve Training's needs for information rather than those of the larger organization.
- When functional areas contact the Training Department for training needs that include changes to the policies and procedures function, the functional areas may believe they have implicitly contacted the Reference Team to have those changes made.
- We learn about the implementation of many policies and procedures after they have been established by a functional department.
- The development of policies and procedures appears to be driven by functional, short-term needs rather than by the strategic goals of the company.
- Because we operate "under cover," our skills in analysis and information design are not utilized even within our own department.

What we would like to see changed

We believe the following organizational changes would benefit the organization and us: We want the policies and procedures function to be acknowledged as an important function that brings consistency to the organization's business practices. We also want to be active partners with policy makers; to be included in policy-making discussions so we can understand the spint and intent of the policies and procedures we write; to be consultants for other functional departments to develop information that is consistent and integrated with strategic goals; and job titles and job descriptions that describe our function and realistically evaluate our performance

Our ideal job title

Our ideal job title is Policies & Procedures Analyst.

Our ideal job description is

Our ideal job description would contain the following responsibilities:

- Serve as "devil's advocates" with policy makers to help clarify policy and identify gaps and inconsistencies.

Strangers, continued on page 9

Trends in Policies and Procedures Communication

By Raymond E. Urgo

Raymond E. Urgo facilitated a discussion about current and future trends within policies and procedures communication. What follows is a summary of his discussion.

Trends due to technology

- The Web, and especially company Intranets, enhance desire to have P&P available.
- Increased need for talent in designing P&P information for the Web and Intranets.

Trends due to business and industry

- Industry cycle repeating (private, public utility, government).
- Growing businesses born in the 1990s are requiring P&P documentation.
- Organizations becoming knowledge management focused.
- High turnover in human capital (knowledge out the door) requires documented business practices.
- Continued need for industry standards requires P&P documentation.
- Revision in the ISO standard requires revamping P&P documentation.
- To meet global and localization needs, large organizations may need to single-source P&P.

Trends in talent for developing policies and procedures documentation

- P&P shifting to training and performance improvement (not merely for auditors).
- Quality assurance talent developing and advising others on P&P documentation.
- Technical people working in XML-based publishing are becoming involved in P&P documentation efforts, often unknowingly reinventing standards for structuring information.
- Organizations that have subject-matter experts and users develop their own P&P documentation need formal training, mentoring, and editorial assistance.

Trends in P&P resources

- Groups: STC SIG grown to more than 1,000 members; new groups have not emerged.
- Newsletters: One newsletter ceased in October 1997; STC's *Steps & Specs* continues.
- Books published: Campbe11, 1997-1998; Wierenger, 1998; D. Kent 1998; S. Page 1998.

Raymond E. Urgo is the owner of Urgo & Associates, Los Angeles, California and a member of the Orange County chapter of STC.

Achieving Success with Intranet Based Online Documentation

By Edward D.J. Frost

The key to achieving a successful online documentation implementation on an Intranet is to understand that the resulting system is indeed a "system." The need for well-written, formatted and structured documents is necessary, but the interactive framework in which those documents exist is equally important. It is crucial to understand the role of each individual involved in the system from reader to author and information technology (IT) provider.

Understanding the system

Many documentation professionals are facing the challenge of delivering their organization's documentation on an Intranet, often with limited resources and a firm deadline. Often the focus of the project is on the technological challenges such as whether to use PDF or HTML-based Help. Typically such projects deliver documentation online on time, and those involved judge the project a success. Equally typical, the resulting system is actually underused. After six or 18 months, the system is often the subject of a further project to reconsider the initial solution.

Experience with involvement in more than 100 such projects has provided some insight into the problems that often reduce the effectiveness of online documentation solutions. At the root of the problem is a tendency to overlook the need for the system to be successful from the viewpoint of each type of individual involved in it: author, reader, and IT professional.

The model solution will be "friendly" to each role and will not be ultimately dependent on the technological infrastructure. After all, in five year's time, the infrastructure will probably have changed.

Author

Many technologically led solutions force the author to use new authoring tools and learn new methods of structuring documentation. The widespread use of Adobe Acrobat PDF files has forced many authors to struggle with structural and hypertext-link creation problems. The increasing profile of XML as a cure-all will very possibly have the same effect. The model solution will acknowledge that each author has his favorite authoring tool/environment and will allow him to continue to use it. Of course, there is

Acheiving Success, continued on page 9

Policies and Procedures Writing: It's Not Just for Software and Hardware Manuals Anymore

By Audrey Cielinski Kessler

They may not be writing hardware or software manuals, but the three panelists at a session sponsored by the Policies and Procedures SIG at STC's 48th Annual Conference in Chicago—Rebecca Goodwin Deerdorff from the University of Washington, Carol Hoeniges from the Hile Group and Kathleen Craddock from the University of North Carolina Health Care System—agree that the type of work they do falls within the definition of policy and procedure communication.

The panelists agreed also that P&P communication should be defined broadly to include more than just computer hardware and software manuals and instead should encompass an array of business sectors—from hospitals and universities to banking and transportation. The common link between the sectors, the panelists noted, was the documentation of how to perform a given task or an organization's view on a particular policy issue.

Hoeniges, for example, spoke about her crafting of procedures related to operations and safety at a rail carrier.

She noted that her subject-matter experts often were the workers who carried out the day-to-day functions of the railroad. To get the information needed to write the company's procedures, Hoeniges said, she would speak with the workers in a way that is comfortable to them and would use in her documentation the workers' term for an object or process if that name were the one the workers typically used. She added that the document also would reference parenthetically the official name for the object or process.

Craddock shared similar experiences when she spoke about her work on the design, development and maintenance of hospital-related procedures with a Web-based delivery system. For Craddock, subject-matter experts included virtually all levels of hospital personnel, including nurses, aides and laboratory technicians.

On the policy side, Deardorff talked about her work with administrative procedures at a state university, including a project to decentralize the writing of administrative procedures by giving the task to the university's administrative units to handle independently. For its part, the university would retain central control of rules and policies in her environment, Deardorff said, many of the persons writing policies and procedures do so with job titles other than writer and noted that there are many opportunities in a university setting for persons interested in writing policies and procedures. Job opportunities in the P&P field are available as well for independent contractors like herself, said Hoeniges.

The road to a P&P career, however, doesn't have to start with that intention in mind. Such is the case for the three panelists, none of whom set out with the goal of becoming a P&P writer. Instead they either "fell" into the position or the position they held evolved to include responsibility for preparing P&P documents. None of the panelist, however, regretted the turns that brought them to where they are today in their profession and instead indicated that the work can be not only challenging but also rewarding.

Audrey Cielinski Kessler is the owner of The Write Hand of Ohio, a writing, editing, desktop publising and Web site design company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC, and manager of the Policies and Procedures SIG.

P&P SIG members (from left) Kathy Craddock, Rebecca Goodwin Deardoff and Carol Hoeniges address questions during the panel discussion "Policies and Procedures Writing: It's Not Just for Software and Hardware Manuals Anymore" at the STC 48th Annual Conference. Photo by Audrey C. Kessler

Opportunities

Interested in becoming involved with the ***Steps & Specs*** Newsletter team? There are lots of ways to do that.

One way is to write a book review for the quarterly publication. The book should be related to policies and procedures communication and between three and five columns long.

For more information, contact:

Kathy Craddock
dizsuitsme@aol.com
919/966-7904