Vol. 8/ No.4/ Winter 2002

Steps&Specs

The newsletter of the STC Policies and Procedures Special Interest Group

Taking the 'Dis' out of 'Disabilities': Special Needs SIG Seeks Support

By Daniel Voss

Editor's Note: This article is being printed upon request from STC's newest and smallest SIG, the Special Needs SIG.

Just a reminder as the STC membership renewal process creeps up on its February 28 deadline. The Society's newest SIG, the Special Needs SIG, is still looking for new members to support it in its twin mission of assisting technical communicators with disabilities in the practice of their profession and providing all technical communicators with information that will help them make communication products more accessible to users with disabilities.

A goal of the Special Needs SIG is to make communication products accessible to the disabled.

Though it has been in existence only a short while, the SN SIG has made significant progress, including the development of a comprehensive Web site (http://www.stcsig.org/sn/index.shtml) and an online newsletter (http://www.stcsig.org/sn/newsletter.shtml). The SIG also provided extensive support to STC's 49th Annual Conference, including publication of *Guidelines for Persons with Special Needs* and an *Addendum* thereto. During the conference, the SIG held a successful progression and had several articles published in the conference *Proceedings* (http://www.stc-orlando.org/prodev/49notes/SNC.asp).

Still there is much yet to do. To accomplish it, the SN SIG needs more members. It is looking both for active members to join the SIG's initiatives and patrons whose affiliation will help the SIG secure the budget it needs to fulfill its objectives.

If you want to support the SN SIG, you have two options. If you have not yet submitted your STC membership renewal, simply check the SN SIG box when you do. If you have already submitted your STC membership renewal, download the SIG sign-up form from http://www.stc.org/PDF_Files/sigform.pdf, and submit it directly to the Society office. In either case, in order to be added to the SN SIG's newsletter and/or Listserv without delay, contact daniel.w.voss@lmco.com or jvinegar@myranch.com.

Dan Voss is a member of the Orlando chapter of STC and manager of the Special Needs SIG.

STC Telephone Seminars

Creating Persuasive Executive Summaries

Stacia D. Kelly
February 5, 2003
1 p.m.-2:30 p.m. Eastern Standard Time

Do you think your executive summaries could be tighter? Cleaner? Provide a more polished view of your services to your clients? If you answered yes to any of these questions, you need to attend this seminar. You will learn how to develop a professional, persuasive executive summary that will get your

Telephone Seminars, continued on page 5

In This Issue

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Manager's Report:

Anniversary . . . Member Involvement . . . Remodeled SIG Web Site

The new year has arrived and with it comes an anniversary. It was 10 years ago that the idea of establishing a Policies and Procedures SIG began to take shape. Since then, the SIG has grown considerably, both in numbers and in its status as a group for a specialized field of technical communication. Check the spring issue of *Steps & Specs* for more on the history of and what lies ahead for the P&P SIG. With continued member involvement, the SIG can look forward to a bright future.

On that note, I would like to invite you, the members, to consider getting involved in the SIG by writing an article for the newsletter or agreeing to be the subject of the newsletter's member-profile feature. For the latter, you simply answer some questions and e-mail them to the newsletter editor. Articles don't have to be long and can be geared toward any experience level. Don't think that just because what you have to say seems rather basic, no one would be interested. To SIG members new to the field of policies and procedures communication, the information may actually be quite useful. For more experienced members, your article can serve as a refresher course. The next article deadline is February 15. Contact newsletter editor Kathy Craddock at kcraddoc@unch.unc.edu or dizsuitsme@aol.com for more information or to discuss an article idea you are considering.

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I'm pleased to announce that the redesign of the SIG's Web site has been completed and is up and running. To take a look, go to www.stcsig.org/pp. Thanks to SIG member Janice Haskins for her work on the project. If you have any ideas for additional content or have any other comments about the site, contact Haskins at davejan@ibl.bm.

Check it Out...

The P&P SIG's Web site is up and running and ready for visitors. Visit the site at the following address: http://www.stcsig.org/pp.

Comments? Suggestions? Contact Janice Haskins at jhaskins@logic.bm and let our Webmaster know what you think.

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.

Member Profile: Janice Haskins

Editor's Note: This quarter, Steps & Specs *is pleased to introduce Janice Haskins, who serves as the SIG's Web master.*

Janice Haskins

S&S: Can you briefly describe your background for our readers?

JH: I started my career as a health records administrator in Canada, then traveled to both Saudi Arabia and Bermuda to work in hospitals. While in Bermuda, I switched my career to that of a policy and procedure documentation analyst for a local bank, where I still work.

S&S: Tell us about your responsibilities.

JH: My responsibilities at the bank of Butterfield include drafting corporate policies, assisting departments with drafting day-to-day departmental procedures and publishing these to the bank's Intranet.

S&S: What do you like most about your job?

JH: I really enjoy placing information onto the Intranet. I like the idea of being able to link all information throughout the bank, which previously would have been stand-alone documents.

S&S: What are some of your major achievements in P&P communication?

JH: Assisting the Information Technology Department in the development of the bank's Intranet and the subsequent bankwide success of the Intranet.

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

JH: Part of health records administration involves writing policies and procedures and, as I was ready to try something new, I responded to an ad in the local newspaper for a documentation analyst position.

S&S: And what role do you serve?

JH: I am known as the "policy person" in the bank and have even had other companies call to ask about drafting policies. I also assist in various departmental documenting projects.

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

JH: This is the part that can become very difficult, as it does not have the same overall recognition of being a doctor, a nurse or an accountant. I tell people that I write corporate policies, which guide the way the bank is run (the rules if you like), and departmental procedures so that best practice is followed in each department. Then I prepare myself to answer more questions as most people have a hard time understanding this. My mother still doesn't know what I do!

S&S: How do you define P&P?

JH: I describe it as the guidelines and rules for how the corporation/institution works, incorporating best-practice and compliance issues.

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

JH: The overall, number one skill is being able to work with a variety of personalities because staff are not always (seldom) enthused when their time is taken up with describing their job function. The next thing a good P&P communicator needs is a good grasp of grammar to interpret the data and place it into a logical sequence.

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

JH: People skills, attention to details and a good groundwork in grammar.

S&S: What advice would you give someone who wanted to get into P&P documentation?

JH: As above, and then deciding which aspect of documenting you are interested in; that is, collection of technical or procedural information or adding this information to a Web site or hardcopy document.

S&S: Tell us about your role in STC and how that has changed in the last few years.

JH: From reading articles to volunteering to build the P&P Web site. I would like to encourage members to send in information for the site and be part of making this a valuable resource for the entire STC membership.

S&S: What do you like to do outside of P&P?

JH: I like to assist with Web site design, such as being a volunteer for keeping the Bermuda International Film Festival site current, designing the P&P SIG Web site and developing other Web sites. I like to do crafts with friends and my husband and I like to travel.

Janice Haskins can be reached at jhaskins@logic.bm.

Policies & Procedures SIG at the STC 50th Annual Conference

Editor's Note: STC's 50th Annual Conference will be held in Dallas, Texas, May 18-21. The P&P SIG plans to be present with the following sessions. Make plans now to attend and network with your peers. More information on how you can meet fellow P&P SIG members will be included in the Spring issue of Steps & Specs*.*

Topics in Policy and Procedure Communication
Progression
WE 6B Tuesday 11 a.m.- Noon
Location: L'Entrecote

In this progression, review a range of P&P topics, including organizing documentation, combining or separating P&P documents, and extrinsic vs. intrinsic approaches to P&P information.

Moderator:
Audrey Cielinski-Kessler, *The Write Hand of Ohio*
Speakers:
"Policy and Procedure: Together or Separate?"
Dawnell K. Claessen, *Science Application International Corporation*

"Fitting the Format of Your P&P Documents to the Audience and the Delivery Medium"
Susan M. Foskin, *Devon Energy*

"What to Keep and What to Throw Away: Organizing Your Documentation"
Cheryl Hultiquist, *Stanford Linear Accelerator Center*

"P&P Documentation — Is Content the Only Consideration?"
Ralph E. Robinson, *Appendix Publishing Inc.*

"Extrinsic vs. Intrinsic Approaches for Policies and Procedures Information"
Raymond E. Urgo, *Urgo & Associates*

"When Single Sourcing Is Not an Option"
Barbara Scott Zeller, *TCF National Bank*

Estimating Time and Cost for Policies and Procedures Projects
Panel Discussion
MG 2Z Monday 11 a.m.- Noon
Location: Grand Ballroom E

The panelists will discuss ways to estimate the time and financial resources needed to complete a policy and procedure project.

Moderator:
Audrey Cielinski-Kessler, *The Write Hand of Ohio*
Speakers:
Adrienne S. Escoe, *Escoe Bliss Communication*
Susan M. Foskin, *Devon Energy*
Raymond E. Urgo, *Urgo & Associates*

Policies and Procedures Communication 101
WE 4U Monday 4 p.m.-5 p.m.
Location: Manchester

Gain an overview about communicating P&P and the P&P discipline. Learn about the fundamental purpose, principles, techniques, vocabulary, trends and resources for P&P. Discover opportunities and roles for P&P practitioners.

Leader:
Raymond E. Urgo, *Urgo & Associates*

Experiences with Online Policies and Procedures Information
Panel Discussion
WE 5T Tuesday 8:30 a.m.-10 a.m.
Location: Grand Ballroom D

Learn from a moderated panel discussion the important concerns, issues, obstacles and triumphs that three organizations encountered with their transition to having policies and procedures online.

Moderator:
Raymond E. Urgo, *Urgo & Associates*
Speakers:
Diane M. Garcia, *Wescom Credit Union*
Cheryl Hultiquist, *Stanford Linear Accelerator Center*
Jill A. McCauslin, *RADCom, Inc.*

Online Documentation: PDF, HTML or Something Else
Panel Discussion
WE 9T Wednesday 8:30 a.m.-10 a.m.
Location: Morocco

Panelists discuss the different methods of producing online documentation, the pros and cons of each, and strategies for choosing among the various options.

Moderator:
Edward D.J. Frost, *Ringwood Software Inc.*
Speakers:
Edward D.J. Frost, *Ringwood Software Inc.*
Anastasia Gusicova, *Blackwell Consulting Services*
Julia T. Margulies, *Merck & Co. Inc.*
Dana F. Utz, *Sungard Treasury Systems*

Attention All P&P SIG Members

It's still not too late to join other P&P SIG members in presenting at STC's annual conference in May. Presenters are still needed for the P&P progression titled "Topics in P&P Communication." Consider taking part in this presentation opportunity. It's a chance for you to share your P&P knowledge with others—both new and veteran P&P communicators.

The progression format is informal. You present your topic to a table of six to eight people at a time. Each presentation round lasts about 20 to 30 minutes. You need to talk for only about 10 or 15 minutes, with the remainder of the time taken up with questions and discussion among the table participants.

Attention Members, continued on page 5

Telephone Seminars, continued from page 1

proposals in the hands of the decision makers and get you results. This seminar will take you through all the steps necessary in creating an effective executive summary in order to enhance your sales proposal.

This seminar is appropriate for technical communicators, sales, marketing and other personnel who participate in the preparation and writing of proposals.

Fast and Easy Time Management

John Hedtke
February 13, 2002
1 p.m.-2:30 p.m. Eastern Standard Time

None of us has "enough" time, so it behooves us to manage our time effectively. This seminar will introduce you to the basics of time management and show you how to plan your tasks and set your priorities for the maximum effect. You will learn how to do the following:

- Identify time-management problems
- Set priorities, and create an effective to-do list
- Create a daily time log
- Identify your personal cycles and patterns

All of the techniques involved are simple to add to your daily routine and don't require tons of extra equipment or significant changes to the way you do most things. Instead, you will get a daily increase of a couple extra hours of productivity just by adding five to 10 minutes of planning at the start of the day.

What Is a Telephone Seminar?

A telephone seminar is much like a large conference call where the speaker makes his or her presentation over the phone. You simply dial the 800 number from

Telephone Seminars, continued on page 8

Attention Members, continued from page 4

If you have never presented at an STC conference, the progression is a good way to get started. As an added incentive, presenters receive a discount on the conference registration fee. But most of all, being a presenter lets you share your knowledge and experiences with your professional peers. And you are bound to get a lot of interesting comments and ideas from the people who sit at your table.

If you are unsure about a progression topic, consider some of these questions: Do you have an area of expertise or a topic you feel strongly about? Do you have some P&P-related skills you would like to share with others in your field? Did you encounter a P&P-related problem and found a creative way to solve it? Do you have an interesting case study that others might benefit from hearing?

So spend a few moments to consider taking an active role at this year's annual conference. And don't forget—speakers get a discount on the registration fee.

Please respond to Audrey C. Kessler at audck@aol.com by February 28. According to the STC office, speakers must use the speaker registration form that is being mailed to them, or register online at www.stc.org/50thconf/speaker by April 18 to receive the reduced speaker registration rate. Please note that the online speaker registration will be available after January 31.

Get Involved

There are lots of ways to be involved in the sharing of information within the P&P SIG.

One way is to submit your bio. This would be a good place to introduce yourself, describe your expertise, and share your specific interests in policies and procedures. We will use your bio on the SIG's Web site and will feature a P&P member each quarter in the SIG's newsletter. Just a few lines are necessary: your name, position, background, experience and any special challenges you face.

Another way is to submit questions and their answers for the FAQ feature of the SIG's redesigned and soon-to-be-completed Web site.

Both of these are easy ways to be involved and will also serve as a great way to share your knowledge with others and network.

Interested? Contact Audrey C. Kessler at audck@aol.com or 330/677-8598 or Kathy Craddock at dizsuitsme@aol.com or 919/966-7904 for more information or to submit your bio or FAQ.

Sharing Your Expertise: Listserv Contributions

Editor's Note: A recent post to the P&P SIG Listserv asked members to share their expertise on classification of documents. The original, verbatim post and responses received follow below.

Topic: Classification of Documents

Hello everybody,

My name is Pierre Ronziere. I started working as technical writer for the IT department of a bank last year. Coming in, I found myself facing a mountain of documents written by totally independent teams, with no style guide, no templates and no strategy. And, of course, my boss asked me to "organize the documentation." I pulled up my sleeves and got down to work on a basic style guide, comprising above all a classification of the types of documents we have. There were all sorts of names for documents providing the same type of information, so I thought we might choose one name per document type in order to start some sort of standardization. I consequently decided to split the documents into the following categories:

- Guidelines
- Reference Manuals
- User's Guides
- Tutorials
- Project Plans
- Templates
- Reports
- Memorandums (meaning "all the rest")

The general reaction is: "Yes but I have this document that doesn't belong to any category"! Which is usually true, as the documents are written without audience orientation, which means that they have five different goals, one of which is to please the engineer who wrote it. But that's another problem. My questions are, therefore: Do you think I miss some documents with this classification? Do you think it's a good idea to try to group all documents under the same general categories? And, if you think it's a decent idea, how on earth can I convince my colleague engineers to work with me and not to look for **the** exception to the rule?

Thanks in advance for your comments.

Best regards,

Pierre Ronziere

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It sounds like you have a situation common to many technical writers. I've found that the best way to convince programmers or engineers is to show them what you're telling them.

Try to place their "exceptions" in your category structure as you feel appropriate. They can tell you what they think, and they may have very good suggestions. But, if they can physically see what you mean, it will be easier to gain their acceptance of what you are trying to do.

This can become quite touchy, but you were hired to write the documentation and you were asked to organize it. Work with them, but teach them as well. Just as they are experts in their field, you are the expert when it comes to documentation. I hope this helps!

Mabel Marchese

* * * * * * * * * *

Looks like you're on the right track with your categories . . . here's one man's suggestion for your list:

- Policies ("rules"; probably includes most of the memos)
- Reference Guides (includes templates)
- Operations Manuals (for all systems, programs, applications, etc.)
- Training Materials (includes tutorials)
- Reports (includes project plans)

Ken Ries

* * * * * * * * * *

Although many don't know it at first (either due to bad experience or never having a luxury of a tech writer before), we are programmers'/engineers' best friends—their translators. We make their products usable, less confusing and more appealing to audiences who are less familiar with the complicated jargon of their everyday techno-babble.

Our duty, as with any new friend, is to prove to them our worth. Without their buy-in, our jobs are, unfortunately, more difficult.

A few other categories you may wish to add to your list below are also very common in the programming "world" and may get better acceptance, are things like:

- Technotes
- White Papers
- Project Specs
- Requirements
- Test Plans
- Release Notes

Depending on the products and projects that your IT department supports, it may also be helpful (to broaden your effort) to break things into the following three categories (per project/product):

- User Documentation (user how-to guides, such as step-by-step user procs, business/system procedures, user guides, tutorials, release notes, etc.)

Listserv Contributions, continued on page 7

Listserv Contributions, continued from page 6

- Technical Documentation (technical how-to guides, such as installation guides, admin guides, technotes)
- Reference Documentation (all related reference material, such as project requirements, project plans, specs, guidelines, reference manuals, reports, memorandums, white papers, etc.)

By creating three such categories, you are sure to encompass all documentation types for the many groups using your services. Hope this helps!

Susan Dorfman

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How about a "catch-all" category called: "Bulletins." We use that at the bank I work at for many of the documents, announcements, product changes, etc. that do not (or in addition to) fit into one of the categories you have named.

Steven Marshall

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The most important thing I've learned over the years is to assume that whatever system you devise will not be perfect. Allow for additional categories down the road.

Cassandra J. Hemphill

* * * * * * * * * *

I also work in the IT division of a bank holding company. I developed and held the first tech writing position here almost 20 years ago and have seen many changes. The tech writing area has grown from a lone writer to six writers, and we write a far more varied repertoire of documents than we used to. Others in IT are also responsible for writing specific, project-related documents. I'll try to give a brief summary of the types of documents written, who writes them, and what they're used for.

Our analysts work closely with programmers on projects, and it's usually the analysts who write the basic project documents. Depending on the size and complexity of the project, this can include:

Project Initiation Document: High-level document directed to management, explaining the background of the system or product which will be implemented, enhanced or replaced; outlining the need for the project; and giving a high-level overview of the main components of the project.

Project Objective Document: Detailed document directed to programmers, other analysts, users sponsoring or requesting the project and the technical writing area. This document covers much the same ground as the Project Initiation Document but goes into much more detail about what programming changes will be made, what vendor software will be implemented and/or customized, system reports to be written or modified, etc. This document typically includes samples of screens, mock-ups of system reports, field definitions, keying instructions and other things of that nature. This is one of the main documents used by the tech writers to extract information for one or more types of published documentation.

Requirements: This document can range from narrative to pseudo-code and gives more detail about the items covered in the Project Objective Document.

Depending on the project, all three of the above types of documents may be combined into the Project Objective Document, or there may be a set of each of these types of document for every application area involved. Included somewhere in the document(s) is some sort of table outlining responsibility for each phase or aspect of the project. This is where we go to find out who our SMEs are for various topics.

Documentation Plan: This is something the tech writers began using recently when it became obvious that different areas had different expectations concerning what we would produce and their responsibility for project documentation. It was typical for project planners to forget all about the documentation portion of the project and to come to us very late in the planning process and ask for a time estimate "by 2:00 this afternoon" or some such crazy thing. We also found that project teams weren't allotting any of their time for interviews with tech writers, reviewing drafts, etc. We have found a detailed documentation plan to be a great benefit.

Policy and Procedure Manuals: We, as a team, are responsible for maintaining the basic manual used by all of our subsidiary banks. This Reference Manual includes policies and procedures for all activities performed in the bank branches. It's designed to be used by tellers, people who open and maintain accounts, and to some degree by supervisors and managers. This manual is published on hardcopy and on our company Intranet.

System Manuals: These are typically written for the limited audience of IT analysts and programmers and a few sophisticated, corporate-level users in our subsidiary banks. These manuals include record layouts and field definitions, narrative on system processing, narrative on maintenance and manual processing required by the system, information on interfaces to the system being documented, brief descriptions of reports produced by the system as well as formal report documentation, documentation of inputs and outputs, documentation of any customization done to a vendor product, appendices as necessary, and a glossary. These are currently published, in limited quantity, on hardcopy. We will soon create our first copies on CD ROM.

Listserv Contributions, continued on page 8

Listserv Contributions, continued from page 7

System Updates: These are short documents announcing a change to the system. The change can be anything from a slight change to the way we post automatic payments to the implementation of a whole new application. The length of the document is dictated by the complexity of the change. In this document we list the new or changed features, summarize new procedures for the banks, etc. These documents are distributed to nearly every department of every subsidiary bank, as well as the corporate areas of the holding company. We don't distribute them directly to the bank branches; this is left to the individual banks. In the System Update we list the permanent documents that will be distributed to document the change—updates to the Reference Manual, new user manuals, etc. These are distributed on hardcopy, but we plan to wean our users from hardcopy to Intranet distribution as much as possible this year.

System Bulletins: Very similar to System Updates but usually documenting an event rather than a system change. For example, we issue a System Bulletin each year describing the calendar for year-end processing, telling when statements of various types will be mailed, directing the users to the appropriate reference materials for any year-end questions or maintenance they may have to do, etc. These are distributed on hardcopy, but we plan to wean our users from hardcopy to Intranet distribution as much as possible this year.

Training Manuals: We aren't asked to provide the training materials used by our Training Department, but we have produced training materials used for specific projects such as mergers or the introduction of a major new system.

User Manuals: We have a few of these, and they fall somewhere between the System Manuals and the Reference Manual. The audience for these manuals is supervisors and managers in the branches and corporate departments. For example, the manual that describes the system for opening new accounts not only gives instructions for how to key the information, but [it also] describes the automated processing driven by specific entries. The manual doesn't include bank policy or procedure and doesn't include record layouts or an in-depth discussion of system processing. It serves as a troubleshooting guide and an explanation of how certain aspects of the system work. We have User Manuals for all of the major applications used in the banks. These are currently published on hardcopy, but we want to start using the Intranet for distribution over the next few years.

We have defined each of these categories with enough leeway that we don't run into the "yes, but..." objection too often. We have taken existing documents and applied our templates, formats and organization to them and have received no objections. However, we aren't responsible for every written document, and other departments are free to produce their own documents in their own format. The three types of project documents that I outlined at the beginning must conform to the current format as dictated by the current whim of the current high muckety-muck. As you can imagine, the format changes from time to time, but the basic things that I outlined are covered.

One of the ways to have the engineers work with you is to get them to buy into the idea that, if they will follow your guidelines, templates, etc., they will spend **much** less time writing the documents (which, perhaps, you will then polish so they sound like they were written by a writer and not an engineer?) and **much** more time doing what they're good at. My experience is that, if you can manage to make it about something other than control, it will be an easier sell. Most of my nonwriting colleagues are relieved when I say that I really just prefer an outline or something similar from them; that making it look pretty and sound nice is my job. (I don't bother telling them that nobody will understand it if they write it, and that it's also my job to make sure that the document suits the audience.) As with anything else, sell them on what's in it for them, not why they should do this for you.

Best of luck. If I can clarify or expand on any of this, please feel free to write again.

Jo Baer

Telephone Seminars, continued from page 5

your phone, enter your personal identification number, and you're connected! You then sit back and listen to the presentations and join in the lively Q&A discussion.

Benefits

- No travel time
- Pay per site and not per person
- Train all your people without their leaving the office

Cost

- With a telephone seminar, the cost is per site, not per person.
- U.S. sites: $145 USD
- Canadian sites: $160 USD
- Overseas sites: Please contact the STC office

An additional $10 will be charged for registrations received less than five business days before the seminar.

Sign-up today at www.stc.org/seminars.asp.

Deadline Reminder

The deadline for submission for the spring issue of *Steps & Specs* is February 15.

E-mail submissions to Kathy Craddock at dizsuitsme@aol.com or call 919/966-7904 for more information.