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Steps & Specs

The Newsletter of the STC Policies and Procedures Special Interest Group

STC SOCIETY FOR TECHNICAL COMMUNICATION

And the Winner Is…

Some months ago, we launched a contest to rename our SIG's newsletter. After considerable deliberation, the judging committee has selected a new name. It is "**Direction**", submitted by Adrienne Escoe of California.

Adrienne's entry satisfied the contest criteria, and was also appealing because of its simplicity. Several creative entries involved plays on words that would not be understood by our international audience. The new title reflects:

- What the business of Policies and Procedures is about today
- Our image as forward-thinking writers and editors in a rapidly changing environment
- Our commitment to accuracy and usability

Adrienne has received her prize, a copy of **RoboInfo Pro**, courtesy of Sherri Gillespie of Macromedia. The new name will appear on the first issue of 2005.

Thanks to all the contestants for their creative suggestions. They are listed below:

Steps & Specs Newsletter Contest Entrants:

Leslie Schoenecker	Anne Lieder	Debby Nyberg
Hillary Russak	Daniel Vasquez	Sarah Ryan
Leigh Floyd	Kippi Fagerlund	Pat Costa
Salim Rajwani	Miriam Williams	Robert Nimchuk
D. Elmore	Sha-Ron Rhodes	Sarah Ryan
Rhonda Sclanders	Alissa Childs	Adrienne Escoe
Lenore Bartsell	Karina Ritchie	

In This Issue

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

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Manager's Report:

SIG's Leadership Team Kicks Off 2004-05 Year

By Raymond E. Urgo, P&P SIG Manager

We are in now in the second quarter of the STC fiscal year, and already our SIG's leadership team is in motion. All leadership positions of the SIG are filled with volunteer members. The volunteer leaders, representing three countries spanning four time zones, have identified their primary goals for the upcoming year.

As the SIG's manager, from Los Angeles, California, my first goal is to ensure all leadership positions remain filled, with a team-focused relationship among our volunteers. My second goal is to position the SIG in ways that best meet the needs of an evolving global membership and that enhance the image of policies and procedures (P&P) as a communications discipline. I would also like to see the formation of a new position to coordinate information and research efforts to track happenings with policies and procedures communication. (If you have even a curious interest in exploring this possibility, please contact me at rurgo@urgoconsulting.com.)

Dawnell Clausen from San Antonio, Texas is our Conference Proposal Coordinator. She is responsible for coordinating the P&P SIG-sponsored sessions for inclusion at the STC Annual Conference. Her goals, some of which are already in progress, include submitting three SIG-sponsored proposals for progression and panel sessions; coordinating communications between the speakers and conference committee, publicizing our sessions, and participating in a session as a moderator and speaker. Dawnell is leading a first-time effort to have a progression session that involves "communities of practices in P&P".

Lois Marsh from Toronto, Canada remains on board as our Steps & Specs newsletter editor. In addition to publishing four quarterly newsletters this year, her goals include completing a re-design of "Steps & Specs" that meets the needs of all our readers and recruiting a volunteer to create the newsletter "layout" for each issue. Assisting Lois again this year are Kelli Pharo (Orlando, Florida), Assistant Editor and Gem Smith (Houston, Texas), Proofreader.

Candie McKee from Stillwater, Oklahoma will be assisting again this year as Membership Coordinator. In addition to welcoming new members and keeping us apprised of trends in membership counts, her goal is to establish some type of membership list that allows members to contact others in the same area.

Eddy Frost from Salem, New Hampshire will continue to serve as our Listserv Coordinator. His goal for this year is to respond to every listserv administrative request within 24 hours, and write at least one article for the newsletter.

Janice Haskins from Hamilton, Bermuda will continue in her role as Webmaster primarily maintaining the site and seeking to add resource links to our Web's site.

With our volunteer members in place and goals in motion, the SIG is off to a positive start. As always, we welcome your suggestions and additional volunteers for assistance. If you have a suggestion or would like to volunteer in any way, please contact the appropriate volunteer leader or me.

Member Profile: Gregg L. Bender

S & S: Can you briefly describe your business background?

GB: I spent over twenty years as a front-line supervisor and trainer for a regional airline, at everywhere from O'Hare in Chicago to little airports. If you've ever watched "Airline" on A&E, you know what I used to do for a living. I was bored with the job after so many years, so I went back to college and got my Bachelor's degree in Professional Writing & Communication from Southwest Missouri State University in Springfield, MO. As a matter of fact, my advisor there was Kristine Sutliff, who is a Fellow of STC. (Shameless plug!) After graduating, I threw my career search net as widely as I could, and was hired by Atlantic Coast Airlines (now Independence Air, a new low-cost carrier) as a Customer Service Analyst in November of 2003. (www.Flyi.com).

S&S: Tell us about your responsibilities.

GB: Hired to work on their Customer Care Manual and various other projects, I was soon drafted into all kinds of projects. I helped other departments test our company web site for bugs and usability, wrote "how-to" guides for some of the software, and created business forms. I write safety and sensitive security-related material, and bulletins that go out to our Customer Service employees. I also write a weekly briefing for the same audience. My writing is coordinated with each of our airline's departments as well as with the Federal Aviation Administration (FAA), to make sure that we are all saying the same thing the same way.

S&S: Tell us about your audience.

GB: I have to make sure that everyone can understand our policies and procedures, from seasoned professionals to new hires who may read English as a second language. This is just as true of the manual as it is of the bulletins and briefings. At the same time, my writing has to satisfy FAA regulatory requirements and Company standards. Everything I write has to be direct, concise, and reader-friendly, as our front-line employees don't have a lot of time to sit down and read long, windy documents written in passive voice.

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

GB: There is an excitement in the airline business not found anywhere else. You never know what will happen next, but you can be certain that it will be different and exciting. Even now, I still like to go out to the airport just to watch and listen to all the activity. The atmosphere at Independence Air is like nothing I've ever experienced before. We are taking an established regional airline and turning it into a major low-cost airline virtually overnight. It's never been done before, and we're succeeding against all the expectations of the experts. It was great just getting a technical writing job with an airline, but this is far better than I expected when I went back to college.

S&S: What advice can you give to someone who wants to get into P&P documentation?

GB: Be very picky and detail-oriented about writing. If you are already established in a field, try to find an opening writing Policies & Procedures for that field. Remember the old saw, "Write what you know?" It's hard enough to adjust to a new job without adding the complication of learning a new industry, too. Many times, I am able to act as my own subject matter expert, or I know right where to look or who to ask for information. Never be afraid to ask questions. Forget you ever knew about the passive voice, too! You are trying to teach people to *do* something, so write *actively*!

S&S: What's the biggest P&P challenge that you face in your industry or specialty?

GB: Things change rapidly in this business, and I need to ensure that the front-line employees have everything they need to know, when they need to know it. That means that I have to stay ahead of the power curve on many subjects, from security, to procedures, to safety; and it all has to be right the first time. I have also found some other challenges in creating documents like "Lists of Effective Pages" (LOEP's). We literally have to account for every page in our manuals. Pages without content must be marked "Intentionally Left Blank" to assure the reader that something hasn't been left out in error, or a page lost.

S&S: Tell us a bit of personal information about yourself.

GB: My wife and I just celebrated our 25th wedding anniversary, as well as the birth of our first grandchild. We have two grown daughters who both attend Southwest Missouri State. My wife and I share the Membership Coordinator position for Northern Virginia Shetland Sheepdog (Sheltie) rescue (www.NVSR.org). We have four Shelties of our own, two of which are rescues that we kept for ourselves. We also have a grumpy old Siamese cat and tropical fish. I am an avid reader of both fiction and non-fiction, and enjoy researching and building scale model aircraft and spacecraft. If someone asked me to fly with the Blue Angels or to ride the Space Shuttle into orbit, my only question would be where and when to show up!

Gregg Bender can be reached at Gregg.Bender@flyi.com.

Information: It's All About Retrievability

by Melanie G. Flanders

This is the first of two articles by Melanie that re-cap her presentations at last spring's STC Conference in Baltimore.

This is the Information Age. We are relentlessly inundated with more data than we could ever process in a dozen lifetimes. People don't read documents for the sheer fun of it (unless it's a good sci-fi or romance novel); they pick them up because they need specific information. The sooner that information is located, the happier the reader is.

When someone consults a manual, he or she is usually in trouble and does not open the book with a whole lot of patience in hand. When someone is in the middle of a task, retrieving information is an interruption to the work flow.

It is even more imperative to locate online information quickly—the fewer screens that must be accessed and read, the fewer mouse clicks or keystrokes made, the quicker the user can navigate through the information and return to the original task or go on to other things.

The key to writing documentation today is *retrievability*. If the information cannot be retrieved easily, it is not useful. How do we make information easier to retrieve?

- Through the use of meaningful indexes, keywords, topics, and tables of contents
- Through good, logical organization of the information
- Through advance organizers that alert the reader to what will follow in that chapter or section

These retrievability aids can be especially useful when information is mapped into a consistent, logical structure.

- Separate or break information into manageable pieces, or chunks. Information is much more easily digested and recalled when the pieces are small. It is so easy to forget the original topic in a document that contains a "rat's nest" of subsections.

- Group information into small, manageable units. A manageable unit is one that adheres to the chunking limit, which is 7±2 pieces of information. However, as the complexity of the information increases, the chunking limit decreases.

- Include only information that is needed, or relevant, for the reader to get the main point based on that information's purpose or function. In other words, include only the "need-to-know" stuff in each piece of information, or block. The "nice-to-know" stuff needs to be placed somewhere else (maybe in a section entitled "Nice to Know"?). Too many times we are besieged with information that we don't really care to be reading while we are searching for the bit that we need.

- After organizing related sentences into manageable units, label each unit of information. Meaningful labels facilitate information retrieval because they serve as advance organizers that the reader can scan. Readers also learn faster when the information is labeled.

- Use consistent labels, words, formats, organization, and sequences for similar subject matters. Consistency enables the reader to find information quickly, locate similar information while avoiding ambiguity, and focus on content rather than form.

- Organize small, relevant units of information into a hierarchy and provide the larger resulting group(s) with a label. Organize larger units from the general to the more specific.

- Provide information at a level of detail that makes the information readily accessible for the reader while making the documentation usable for *all* readers. In other words, put *what* the reader needs *where* the reader needs it.

A structured writing methodology such as the Information Mapping® method is a way of thinking strategically about information. When designing and developing documentation, writers need to understand how people process and understand information.

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A structured writing methodology enables you to:

- Analyze your intended audience and determine what information is relevant for them
- Organize information in a flexible, modular structure
- Present information clearly so it is easy to read, easy to use, and easy to understand.

However, use of a methodology alone doesn't guarantee well-organized documentation that has good retrievability aids. It is merely a tool that, in the hands of a skilled craftsman, can help produce highly usable documentation. The craftsman must come already equipped with an analytical, logical mind and basic writing and organizational skills.

Melanie G. Flanders, a senior STC member, is Chief Information Architect for KnowledgeMasters, Inc., which is based in Houston, Texas. She was certified in the Information Mapping® methodology in 1984, and has been a practitioner in structured writing technology for over 20 years.

Call for Volunteers – Newsletter Design and Layout

Thanks to Leslie Schoenecker for volunteering to help with the launch of our new HTML newsletter, "Direction". We're still looking for volunteers to help with the re-design and ongoing layout. This is a great chance to learn about working in HTML and put your creative talents to work!

If you're interested, contact the editor at lois.marsh@bmo.com.

Making the Most of Your SIG Membership: Subscribe to the Listserv

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