Additional Conference Presentations Related to Procedures Communication

Compiled by Kathy Craddock

In addition to the conference sessions presented by SIG members, the following sessions related to procedures communication will be offered at the annual conference:

Tuesday, May 15
ID 3E Humanistic and Cognitive Traits of an Information Designer – The need for stronger evaluation criteria for hiring information designers led to an innovative definition of their skill set. In this session, presenters show that achievements, self-esteem, and mental modeling came out on top.

ID 5Q Tapping into Creativity – Information designers are continually faced with the challenge of finding creative information solutions. In this workshop, participants will discover ways to unlock their creative talents to enhance products and processes.

Wednesday, May 16
ID 6R The Effective and Judicious Use of Graphic Elements in P&P Documents

By Audrey Cielinski Kessler

My take on the use of graphic elements in policy and procedure documents is based on the premise that people are more likely to look at the pictures than read the text portion of a document—regardless of whether that document is a user guide, a policy manual, a newspaper or a magazine.

Because of this propensity to favor pictures over text—especially lengthy text—it’s important that graphic elements—from charts and graphs to tables and diagrams—are used both effectively and judiciously.

“Effectively” means using the type of graphic element that is best suited to the nature and purpose of the document and the composition of the audience. It does not mean adding graphic elements just to have them or to fill up space so the document is longer and perhaps (at least to some) more impressive because of its heft. It means using graphic elements to enhance the document user’s ability to perceive and comprehend the intended message. Even the most technically correct document is of little use if its message is not conveyed to the persons to whom the message is addressed.

“Judiciously” means using the type of graphic element that is best suited to the nature and purpose of the document and the composition of the audience. It does not mean adding graphic elements just to have them or to fill up space so the document is longer and perhaps (at least to some) more impressive because of its heft. It means using graphic elements to enhance the document user’s ability to perceive and comprehend the intended message. Even the most technically correct document is of little use if its message is not conveyed to the persons to whom the message is addressed.

The judicious and effective use of graphic elements can have many benefits, depending on the document and its audience. Graphic elements can be used to:

- **Summarize** large amounts of data
- **Organize** complex information
- **Enhance** understanding
- **Highlight** important points
- **Add visual interest** to the document
- **Make** the document more accessible and user-friendly
- **Provide** a visual reference to text

Therefore, the judicious and effective use of graphic elements in policy and procedure documents is of the utmost importance. It means your message, despite its importance or value to the user—may not be communicated. With an outcome like that, both you and the reader lose. You have wasted your time because your message failed to be conveyed; the user wasted his time because the information he was seeking remains elusive.

The judicious and effective use of graphics also has to do with the placement of the graphics within the text and references to the graphics in the narrative portion of the document. The existence of the graphic needs to be referenced in the text with the related graphic placed as close to that reference as possible. The reader should not have to flip several pages before finding the referenced graphic. That’s wasted time for the reader and disruptive of the thought process.

That’s not to say that a graphic must be on the same page as its text reference. It only means that the reference and the graphic need to be in close proximity to each other.

But don’t assume that because the reference and the graphic are close
From the Editor’s Desk
By Kathy Craddock

Spring is here, and I’m glad! It’s time to shake off those winter blues and get busy. This issue of Steps & Specs focuses on the upcoming STC 48th Annual Conference. I’m happy to report that the Policies and Procedures SIG will again be active at this year’s conference. We have a lot planned and hope to meet many of you.

Included in this issue is a list of the policy- and procedure-related sessions at the conference with brief descriptions about each one, their times, locations, and fellow members who will be presenting. Remember that there may be program changes between now and May. Check your final program when you arrive in Chicago for any last-minute information.

Meet Heather Brown-Palasz in our member profile. Heather has provided us with a quick and easy guide of what to do in the downtown Chicago area if you have any energy left after the conference sessions.

The SIG membership report shows how our membership has grown, while the SIG manager’s report stresses that volunteering is vital to the life of such a group.

There are volunteer opportunities, a book review, hints and tips from your peers, and another topic of discussion for the June issue. Let us hear from you!

Kathy Craddock

Upcoming . . .

STC to hold telephone seminar on “Managing Documentation with Humor and Grace”

STC will hold a telephone seminar on “Managing Documentation with Humor and Grace” on April 18, 2001, 1:00 p.m. - 2:30 p.m.

Doreen A. Marrion will present the seminar. Marrion is an award-winning author, manager for the management and professional development stem of STC’s upcoming annual conference, and has worked as a stand-up comedienne.

For details, including an explanation of how telephone seminars work, please visit http://www.stc.org/ seminar_marrion.html.

For information about STC, please visit http://www.stc.org or call 703/522-4114.

P&P SIG, continued from page 5

Down the Lazy River - One Panelist’s Journey
By Carol Hoentges

Imagine a towboat with 15 barges looming ahead of it, making slow passage down the Mississippi River. Then try to imagine the same vessel as part of a competitive industry that has economic, environmental, and safety concerns to address. It is within this transportation industry that I’m involved as the lead writer in the development of policy and procedures for river barge line companies. At the STC conference in Chicago in May, I will speak about how my company assists in the writing of operations manuals using a participative, team-based process.

Our team is comprised of many salt-of-the-earth, knowledgeable mariners who function in various roles on the vessel and on shore in operations and personnel departments. From captains to shipyard managers, the members of the team actively participate in team meetings and help write their own text. Because they know their procedures best, I work closely with them to identify what work processes are critical to address in the manual. From there, we negotiate the level of detail the procedures will contain, recognizing that on-the-job coaching and other training initiatives are often better suited to handle the overwhelming amount of detail and knowledge needed to complete the job safely and efficiently.

The operations manual we develop functions as a management tool and as a resource for the employee. With their primary medium being paper manuals with frequent updates, we work hard as a team to build the best structure for the document. The team members help me see what makes sense to the user because they are, in fact, the users themselves. This highly interactive level of engagement with team members replaces more traditional methods of interaction with subject-matter experts such as interviewing. As the writer in this process, I become the project leader and information manager, while also building my skills as facilitator of the team meetings. The returns are outstanding. We not only have a “book” that works but we have also added value through the team’s dialogue, calibration, and sharing of best practices throughout the process.

Carol Hoentges is a writer with the Hile Group in Bloomington, Illinois, a consultancy specializing in performance improvement and workplace documentation. Hoentges partners with clients in operations and safety departments to develop various kinds of organizational documents. Hoentges is a senior member of the Society for Technical Communication and has presented papers or team-based writing process at STC regional and national conferences.
Tips for Making the Most of the STC 48th Annual Conference

By George F. Hayhoe

The following are excerpts from a post to the TECHWR-L listserv from George F. Hayhoe, May 1999 on how to make the most of the STC 48th Annual Conference and is used with permission.

Introduce yourself to others at the conference. You will notice lots of others who are there by themselves and would be delighted for you to talk to them.

Chat with speakers and folks active in STC at the Society level. Share ideas and the honors banquet (ticketed) on Tuesday. It shouldn’t be difficult to make plans for post-reception or post-banquet socializing at those functions. Be prepared to learn a lot, to meet a lot of new and interesting people, and to get a fresh perspective on our profession.

Tuesday. It shouldn’t be difficult to make plans for post-reception or post-banquet socializing at those functions. Be prepared to learn a lot, to meet a lot of new and interesting people, and to get a fresh perspective on our profession.

If you have special needs (diet or disabilities), indicate them on your registration form or contact the STC office at 703/522-4114 to alert them and ensure that your needs can be accommodated.

George F. Hayhoe is the founder of George Hayhoe Associates in Aiken, South Carolina. George is a fellow of the STC and member of the South Carolina Chapter. He is the editor of Technical Communication, the Society’s journal, and served on the Society’s board of directors from 1992–1996. George is the recipient of the APEX Award for Publication Excellence (1998), and winner of Awards of Distinguished Technical Communication from the South Carolina/Carolina Foothills STC chapters (1998–99).

HELP WANTED

Policies & Procedures SIG Newsletter Team

Steps & Spece is published quarterly and can always use extra help and suggestions. We need volunteers to solicit, and write, articles on policies and procedures topics and write reviews of newly published books about policies and procedures documentation. We also need help with production, layout and design, researching useful Websites; and contributing hints and tips. If you are interested in being a part of this award-winning publication, contact Kathy Craddock at dzzsuisme@uol.com or 919/966-7004 for more information.

Policies & Procedures ListServ Team

The P&P SIG Listserv team needs someone to be responsible for archiving posts. This person would work with the Lистserv manager to archive past posts and make them accessible to subscribers. If you are interested in this role, you should contact Audrey Cielinski Kessler at audiek@uol.com or 330/677-8598 for more information or to volunteer.

Policies & Procedures SIG Website

The SIG’s website, http://www.stc-sig/policies.html is currently under revision, and suggestions for content are welcome. Contact Luette Arrowsmith at luette_a@hotmail.com to share your ideas or to volunteer your skills and expertise.

Manager’s Column

By Audrey Cielinski Kessler

Organizations such as STC and, by extension, its network of special interest groups, rely heavily on the talents and skills of their members and their willingness to volunteer their time. As we all likely know, time—especially “spare” time—is in short supply, with work and personal commitments impinging on us from all sides.

So what would motivate a time-strapped P&P professional to volunteer with help with the day-to-day operations of the P&P SIG? I’m sure the reasons are many and varied, but what seems to distinguish successful and valued volunteers from the rest of the crowd is an attitude of “What can I give?” rather than “What’s in it for me?” or “What can I get out of it to help further my career?”

This is not to say, of course, that getting a personal benefit from volunteering is bad or wrong or undesirable. It’s simply an added benefit, like the proverbial “icing on the cake.” It’s the giving that adds value to the organization; the personal benefit can make the effort seem that much more worthwhile. When the primary goal (or in some cases, maybe even the only goal) is “what’s in it for me,” it’s the organization and its members that suffer.

The emphasis then shifts to the individual and away from the group or the team and what is best for it and what will further its growth and usefulness to the membership.

Volunteering can take time that may not really be there, and it can make already hectic lives even more frenzied, but the payoff is that by giving, we also get back.

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

Your Turn - Responding to our Questions

Compiled by Kathy Craddock

The following article is in response to the Your Turn question in the December issue of Steps & Spece. “What type of font should I use in hardcopy documentation? Should I use the same one for online documentation?”

From Carrie D. Cooper: The ideal procedure documents are simple, clear, and orderly. Use the same font in all documents because they want to know how to do something. The more time they spend with your document, the less time they spend actually doing the task. Procedures are no place for overblown production, extra-fancy type, lots of clip art or anything else that will distract the reader from finding the needed information.

Since procedure documents are primarily designed to be read, your goal is to ensure that both headings and body text are easy to read and pleasant to the eye. Most of all, avoid quirky fonts. Some fonts, like Eras or Comic Sans, might be fine for headings, but they are too distinctive or informal to be used as body type in procedures.

I personally recommend using a combination of sans-serif fonts for headings and serif fonts for body type.

Serif fonts (those with little feet), such as Adobe Caslon, Adobe Garamond and Times New Roman, are easy on the eyes for large blocks of text. One of the most commonly used fonts, Times New Roman, first appeared in 1932 in The Times of London newspaper, according to the Microsoft typography page. Before & After magazine refers to the Times family as the “navy blue blazer of fonts” because they are always appropriate for text.

I personally recommend using a combination of sans-serif fonts for headings and serif fonts for body type.
In his book *Smart Companies, Smart Tools*, Thomas M. Koulopoulos defines smart tools as the use of, “technology to remove the mundane and monotonous that impede creative innovation.”

He says, “This book is about the inextricable relationship between business process and business assets, which, if understood, can provide quantum competitive opportunity for savvy organizations.” Koulopoulos says the traits of a smart company include:

- Integrated rhythm of work independent of organizational structure
- High degree of process intimacy among employees
- Asynchronous communications to bridge time and geography
- Technology to leverage rather than eliminate people
- Strong emphasis on return on time as the principal success metric
- Extended enterprise that encourages nontraditional employment

To become a smart company, Koulopoulos proposes using a technique called time-based analysis. This technique requires developing a system schematic or a visual representation of tasks to be performed whether in a department or larger business entity. The values of a system schematic are:

- It creates a corporate memory of the process
- It provides data for analyzing the process and
- It creates a dynamic framework for a collaborative reengineering of the process.

Koulopoulos emphasizes that a system schematic is a picture of what is at that moment and notes that the system schematic will go through a number of iterations. The system schematic shows how long a task actually requires as well as all other activities related to the task. One case history showed that while it took five days to develop a procedure, it took a month to have it approved.

Of interest to technical writers is the author’s description of how a system schematic is developed. He says, “The actual data for building the system schematic will come from a number of targeted interviews with users, sponsors, developers and any individuals considered representative of the organizational processes that have been targeted.”

Koulopoulos devotes several pages to the interviewing process and suggests sample questions as well as advice on how questions should be framed.

He cites case histories to illustrate how smart tools have been used to move work to the worker (process intimacy), reduce transfer times and queue times (time he calls “white space”) without perceptible change to the task itself.

He defines transfer time as “the time required to transfer information from one task to another” and queue time as “how long information will sit around before someone begins to work on it.”

Koulopoulos observes, however, that no one takes responsibility for transfer time. It may seem to be part of the task but he says transfer time belongs to the process itself which makes it a process issue and not a people issue.

He says most people are astounded to learn that “the standard ratio of transfer time to task time, across almost all industries, is nine units of transfer time to each unit of task time.”

To him, moving the work to the worker is the key to becoming a smart company. Koulopoulos acknowledges, however, that getting there requires significant changes in organizational structure and attitudes. Referencing Henry Ford’s contribution to industrial efficiency, Koulopoulos reminds us that it was not the assembly line itself that changed the nature of work but that the assembly line brought the work to the worker.

Koulopoulos explores how the internet, intranets and extranets bring needed information to anyone anywhere. “The key to creating a boundless enterprise lies in sharing not only information but also processes across the entire value chain of activities, from production to consumption, through a single universal computing interface. Transfer times can be collapsed, thereby creating new levels of intimacy with customers, suppliers, and teams. That, in essence, is the intranet. It is, simply put, the strongest process glue ever invented.” said Koulopoulos. As an example of the lack of process intimacy, he cites Robert McNamara’s tenure at Ford Motor Company. McNamara believed that statistical centralization, centralized accounting procedures and strict adherence to metrics were the key to efficient management of any organization large or small.

That view ignored employee relations, morale, job satisfaction and a firm’s mission because these “soft” variables could not be measured numerically. Each chapter covers the details of the seven traits that identify a smart company using case histories drawn from developers and any individuals considered representative of the organizational processes that have been targeted.

Koulopoulos explores how the internet, intranets and extranets bring needed information to anyone anywhere. “The key to creating a boundless enterprise lies in sharing not only information but also processes across the entire value chain of activities, from production to consumption, through a single universal computing interface. Transfer times can be collapsed, thereby creating new levels of intimacy with customers, suppliers, and teams. That, in essence, is the intranet. It is, simply put, the strongest process glue ever invented.” said Koulopoulos. As an example of the lack of process intimacy, he cites Robert McNamara’s tenure at Ford Motor Company. McNamara believed that statistical centralization, centralized accounting procedures and strict adherence to metrics were the key to efficient management of any organization large or small.

That view ignored employee relations, morale, job satisfaction and a firm’s mission because these “soft” variables could not be measured numerically. Each chapter covers the details of the seven traits that identify a smart company using case histories drawn from his consulting practice with companies representing life insurance, defense contracting, computer hardware, cable entertainment and physical fitness equipment. Smart Companies, continued on page 11
Hang onto Your Hats - The P&P SIG Is Blowing into Chicago

By Kathy Craddock

Join your fellow P&P SIG members at the STC-48th Annual Conference in Chicago, IL, May 13-16 at these two sessions:

Tuesday, May 15, 4:00 p.m. - 5:30 p.m. WE 8Y Issues in Policies and Procedures – This progression demonstrates how to ensure that policy and procedure documents prepared for online or hardcopy distribution are useful for the reader and meet the needs of management.

Session Moderator: Edward Frost.

Presenters are as follows:


Description: Synergies that can be gained between training and policies and procedures (i.e., standard operating procedures) include the following: training materials that refer to policies and procedures documents rather than duplicate them, sharing of the development process, engaging in joint efforts to conduct user- and task analysis and pilot new materials, and sharing people resources to complete projects.

Treosh Otten Topic: Turning a Skeptic into an Online Reference Champion.

Description: For writers of policy and procedure documents, building and maintaining cooperative relationships with content owners and subject-matter experts is essential to the success of the project. By understanding the business in which one works and supporting the organization’s goals, the policies and procedures writer can leverage the type of relationships that prompt knowledge holders to provide the resources needed to prepare a quality document. The presentation will focus on a process that acknowledges the importance of relationships and enables the writer to quickly establish an effective and profitable relationship in a short amount of time.

Edward Frost

Topic: The Pros and Cons of Intranet Delivery Technologies for the Publication of Policies and Procedures Documents

Description: The presentation will offer six recommendations both pro and con on the issue of publishing policies and procedures documents on an intranet.

Audrey Cielsinski Kessler Topic: If You Write It, They Will Read — Maybe

Description: 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 in between—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 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 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.

Kathleen Craddock

Topic: Preparing Policy and Procedure Documentation (and Authors) for an Intranet

Description: The table host will discuss the advantages of single sourcing process.

Edward Frost

Topic: Trends in Policy and Procedure Delivery Technologies for the Publication of Policies and Procedures Documents

Description: Don’t dismiss the single sourcing process just because you can’t get your hands on the right tools. If your operation doesn’t have the budget or someone outside of your industry selects your tools, there is no excuse not to take advantage of single sourcing process. This session takes a creative look at ways to employ single sourcing principles to make a point. In the corporate world says: “no” to your request for new software, you can still say “yes” to single sourcing.

Ralph Robinson

Topic: International Standards

Description: The presentation will cover the impact of international standards on policy and procedure writing, with an emphasis on ISO 9000:2000 and ISO 14000.

Raymond Urge

Topic: Trends in Policy and Procedure Communication

Description: The presentation will address how the following are having an impact on P&P communication: technology, business, industry, organizational development, and competition from other disciplines. Trends within the discipline of P&P communication also will be discussed.

Kat Noetzl Nagel

Topic: Each One Teach One

Description: The presentation will focus on creating a self-containing policies and procedures environment by creating templates and encouraging cooperation, collaboration and knowledge sharing.

Vol. 7/No. 1/March 2001

P&P SIG, continued on page 11
Member Profile: Heather Brown-Palsgrove

By Kathy Craddock

Editor’s Note: This quarter, Steps & Spices is featuring a P & P SIG member and the STC Annual Conference host city, Chicago, Illinois. If Chicago isn’t new to you, it is for me, you will learn a little bit about the city, especially the area where conference attendees will be staying and traveling around, what to see in your spare time, and what to do in your free time before, during, and after the conference. Check out the following list of proven Chicago favorites to help you decide.

Free Stuff
Chicago’s business district, which is called “The Loop” because of the elevated train tracks encircling the area, boasts an impressive collection of public art. Along the walk to the most well-known works by artists such as Picasso, Miro, Calder, Chagall, and Haring, you’re bound to come across many other pieces that have become Chicago icons. For more information on Chicago’s public art, see the city of Chicago Web site at http://www.ci.chi.il.us.

If you are an architecture buff, you will also appreciate the public art in the many important architectural triumphs of our great city, including works from Louis Sullivan, Mies van der Rohe, and Frank Lloyd Wright. If you are willing to spend a little dough, one of the most popular guided tours offered by the Chicago Architectural Foundation for more information, tour hours, and reservations, (which are recommended) see http://www.architecture.org.

It’s impossible to miss one of Chicago’s greatest landmarks: Lake Michigan. The lakefront poses many opportunities for recreation, exercise or just plain relaxing. Simply find your way to the lakefront by walking east and observe Chicagoans in their native habitat. If you are the ambitious type, you can also explore the lakefront by walking south toward areas such as Grant Park. But if you are like me, you will just find a nice patch of sun and kick back with a good book. You will be in good company either way.

Also try the Lincoln Park Zoo. From its inception in 1868, the LPZ continues today to be a zoological park. The diverse collection of birds, mammals, and newly constructed exhibits (check out the new Sea Lion pool) makes our zoo one of the best in the country. Because exhibits typically change every year, consider adding this to your checklist of pre- and post-conference activities. At approximately six miles from the conference headquarters, this is a fast bus ride (local 151), cab ride, or walk. For zoo hours and special events information, see http://www.lpzoo.com.

Dining Options
Pothos’s Sandwich Works at 190 N. State Street is just a short walk from the headquarters, but be prepared to spend twice the time standing in the line for what most Chicagoans consider to be the best sub sandwich around. Besides the food, it’s worth the wait to sit and enjoy the cozy, anti-city-styled décor and the resident guitar that performs during weekday lunch hours.

If you don’t know why the Billy Goat Tavern at 430 N. Michigan is a slice of American culture, then that’s reason enough at least to visit the infamous haunt of Chicago Tribune and Sun-Times reporters and journalists, if not to stay one of the “cheezehogers” immortalized by Saturday Night Live’s John Belushi. Be sure to check out the picture gallery: it’s a guaranteed way to get some celeb-sighting in.

Chicago-style pizza might be a myth in other parts of the country, but it’s definitely for real here in the Windy City. One of the best places to try downtown is the original Pizzaria Uno (29 E. Ohio), or a larger expansion restaurant with the same menu, Pizzaria Due (619 N. Wabash). If you decide to go, consider ordering your pizza in advance, as pizza orders typically take 30-45 minutes. Either way, though, you’re bound to have good pizza.

While not necessarily a Chicago-exclusive restaurant, the Cheesecake Factory (875 N. Michigan) is definitely a Chicago favorite and well worth a visit.

The menu, a veritable book, includes an assortment of appetizers, salads, pasta, sandwiches, seafood and traditional entrees with some ethnically inspired dishes and comfort food thrown into the mix just for fun. And yes, they do have cheesecake, more varieties than you might care to count, so be sure to save room. With this long list of options, though, comes a similarly long waiting list (be sure to call in advance, sometimes even 30 minutes), so don’t even try to get in and out for lunch. Plan on dinner, and try to get there early. Fortunately, the Cheesecake Factory is close to the conference headquarters, so you can plan on a brisk walk or a bus or cab ride to get you there quickly after the day’s last session. If you go, plan on staying afterwards to tour the John Hancock Observatory. It’s not far and it won’t take long, just a 94-floor elevator ride in under 2 minutes and 30 seconds. From the top of the John Hancock, Chicago’s second-tallest building and nicest lookout point, you can see everything that’s great about Chicago. For more information and a discount coupon, see http://www.hancock-observatory.com.

You might have already heard about The Bergoff in The Loop (17 W. Adams). It’s not just a beer, though. It’s a restaurant, and one of Chicago’s oldest and most famous restaurants to boot. True to its name, the Bergoff serves traditional German food, but also has added some light and vegetarian options added to your checklist of pre- and post-conference activities. As Monet, Gauguin, Renoir, Van Gogh, Cezanne and Caillebotte. See http://www.arts.edu.

Field Museum (1400 S. Lake Shore) Exhibits and collections devoted to the biological and anthropological exploration of the natural environment. Popular exhibits include: Sue, the largest T. rex skeleton, and Undergraduate Admissions of the soil ecosystem from a bug’s perspective. See http://www.fieldmuseum.org.


Adler Planetarium and Astronomy Museum (1500 S. Lake Shore) Planetarium features a new StarRider Theatre, a virtual, self-controlled space tour, as well as special space exhibits at the adjoining museum. See http://www.adlerplanetarium.org

Shedd Aquarium and Oceanarium (1200 S. Lake Shore) Aquarium exhibits include fresh and saltwater fish and aquatic mammals from around the world. The new Oceanarium wing replicates the Pacific Northwest coast environment. See http://www.shedd.org.