

Our Process: Offsite and Fixed-Cost Documentation Projects

Determine client needs

When you have a print or online documentation project in the works, calling Underwhelmed should be the first step you take in the planning process. We'll schedule an appointment for one or more of our experienced project managers to meet with your staff free of charge to discuss how we may best serve you. We'll ask detailed questions that help you choose the wisest strategy for getting the most value, in addition to serving your product's needs in the best way to gain attention and praise from your client audience, magazine reviewers, and industry peers.

Each documentation project requires a personalized strategy. The staffing and time requirements are obviously much greater to develop a full documentation set for a new software's first release than to provide a basic revision to existing materials or to write a set of data sheets for a family of hardware.

Assess project scope

The scope of the project depends on a number of variables:

- How many screens must be documented in the software version to be released?
- Do you need context-sensitive help topics?
- Who is the audience?
- What is the planned date of release for your product?
- How long before the date of release can you include us in your documentation and marketing development process?
- Do you want print documents, help systems, Web-based documents, multimedia presentations, or all four?

The earlier we are included in your product development process, the less the documentation process resembles a fire drill. Planning takes time, but it can prevent tremendous hardship for your staff in the stressful weeks just before the product leaves your warehouse.

Develop estimate

The cost and schedule depends on the scope of the project, the intended audience, and your marketplace.

- Do you want a slick set of documents that blows the competition out of the water?
- Do you want a more modest documentation style, with simple, clean text that easily guides your customers through the process of installing and using your product?
- Do you already have previous documentation or other written information for most of the product's features?
- Does your staff have time to communicate with our team?

These factors, and many more, must be considered to provide you with a solid, reliable budget. Sometimes, if just one little piece of information is overlooked (for instance, your VP of Marketing's 3-week sales trip conflicts with the documentation interviewing schedule) it can cause delays that affect delivery and everyone else's timeframe as well. How can this be avoided? Take the time to discuss all the factors that go into bringing a documentation project to completion. That requires knowledge and awareness of the pitfalls; that requires planning

Underwhelmed has been in business for over 10 years. We provide a team of experienced people who are committed to delivering the project you want at a reasonable price on your schedule. We'll provide you with the most detailed estimate possible, given the information available to us at that time. We'll work with the information you provide us and let you know if we see any potential problems.

Up to this point, our time has cost you nothing. We have invested time in your project on a purely speculative basis with the intent to build a long-term business relationship. If you are comfortable enough with our estimate (and we are comfortable enough with our ability to meet your requirements) to draw up an Agreement, then that is the next step.

If either party requires more information, a more detailed scope of work or a firmer estimate, then a detailed scope and analysis is a good idea. The level of detail depends upon the situation. It may be a complete documentation plan and project schedule, which should be done in the first phase of the actual project anyway, or it may be something less formal. Regardless, we must charge for this service; therefore, we would draft an Agreement covering only this initial work. The documentation plan that we develop can either be implemented by us, or by another technical-publications consulting firm of your choice.

Generate written agreement

After you are comfortable with either our initial estimate or documentation plan and project schedule, Underwhelmed sends you an Agreement outlining all the relevant facts. These may include the scope of work, information dependencies to complete the work, review schedules, deadlines, confidentiality clauses, and payment terms.

It is sometimes necessary to sign a confidentiality agreement well before drafting the Agreement, perhaps even during our initial meeting. We understand and support your desire to protect your organization from the risk of disclosing intellectual property or proprietary information. We are prepared to work with your marketing and legal departments to ensure that your business interests are protected. Likewise, we appreciate your understanding for us to do the same. Well written Agreements minimize the kind of miscommunication that can affect the success of the project from both standpoints. If you are confident in our professional standards, it only stands to reason that we can plan on a successful and long-lasting working relationship.

Develop documentation plan and project schedule

It is in this phase that the reality of the initial estimate is tested. It may become obvious that meeting a specific (and demanding) deadline requires more writers than the initial estimate calls for. We can accommodate. You may have put more thought into the project by now and proposed additional enhancements. We can accommodate. The final ship date or gold-master delivery date may slip. Your competition announces new product dates that are far sooner than your marketing department anticipated. Your budget concerns are affected by outside economic factors. We can accommodate. These issues must be considered, discussed, and resolved to finalize the documentation plan and overall cost estimate.

The project schedule is a visual representation of target dates. It lists each activity (writing, review cycle, editing, publication) included in the documentation project. Laying the activities out graphically also points out possible logistical bottlenecks—places where too many people are trying to do too many things simultaneously. Our team identifies the problems and works to resolve conflicts in the process. It is your job to make sure that your staff is available during critical review periods or at the end of the production cycle, when attention to detail and availability to sign off on the document are essential.

These procedural elements are documented and provided to your staff for review. Upon agreement, they are used as the road map for guiding us through the actual project development.

Template design and editorial style guide (for new documents only)

If the document we are developing is for a new product, and no previous documentation exists, our team will develop a template and an editorial style guide for all writers to follow. The template provides a framework for strong visual and logical information transfer. The style guide lists common uses and anticipated language issues. A comprehensive list of acronyms, definitions, and style guidelines such as capitalization, emphasis, special fonts, and conventions is developed. Localization issues are also considered. For example, if the document is translated into several languages, what numbering systems and graphical icons are most appropriate? Once the style guide is developed, our project manager meets with your marketing, technical, and translation team experts to review and obtain final sign off on these critical issues.

Information-gathering: interviewing and analyzing legacy material

The Agreement has been signed. We've all consented to deliver certain things. You know what you want. We know what we need to give you what you want. Now we're actually ready to get started doing the work. Although the Underwhelmed team has spent considerable time reviewing the materials pertaining to your project, it is essential for the team members responsible for writing the documents to meet with subject-matter experts, designers, marketing representatives, and other involved parties. Whether the project is a simple family of hardware or a complex suite of integrated software, considerations about presentation, marketing placement, and audience must be discussed and verified, depth of analysis agreed upon, and level of complexity determined.

We have been in this business long enough to have an idea of what usually works, and what may not. Our meetings may range from several hours for an all-hands strategy meeting to a 20-minute phone conversation. We also want to study and review any previously created documentation pertaining to the product. These might include: product data sheets, design specifications, previous user documents on paper and online media, and original write-ups from the engineers, managers, and marketing professionals responsible for the product's development. Anything and everything is helpful to the documentation team as we begin the process of analyzing the main and subsidiary elements of the product and designing the documentation to support it.

All of this analysis is important. We certainly want to take as little time as possible away from your team's focus on finalizing the product for release to market, but it's essential for you to help us by stressing the importance of your staff's cooperation with us. Their insights will help your customers to get the training, knowledge, and information they need to use your products properly. More important to your bottom line, if we can easily obtain accurate and complete information about using the product from your people before the product ships, your customers will have little reason to call your technical support line.

Initial writing

The writing process begins once the original material is analyzed, the first meetings and interviews are recorded, and our writers are satisfied that they possess sufficient information to start. The document content is already outlined clearly in the documentation plan. Existing information is placed in the appropriate locations within the document. All outdated details are rewritten to the latest specifications, and new data is added where appropriate. Depending upon when the Underwhelmed team gets involved, the number of writers on the team, and the size and scope of the project and product, this part of the effort can be completed in 2 to 6 weeks or it can take as long as 6 months.

Initial Underwhelmed edit: developmental and copy

Once the available information is written, rewritten, and organized, the document undergoes both a developmental and a copy edit. A developmental edit is usually performed by a project manager from Underwhelmed with experience in the product field. The project manager approaches the document as a work in progress, analyzing the information for the important elements of clarity, consistency, completeness, and content flow.

Some important questions are considered during a developmental edit:

- Does the information included in the document need to be there?
- What is missing from the current document that can help the client/audience better understand how to implement the product for the best results?
- Are the procedures listed in the proper order to accomplish the most common tasks without causing problems for the user later in the process?
- Is there a sense of building knowledge or does the document's structure cause confusion?
- Have the writers clearly understood the user's cognitive path?
- Does the document provide the best style of information for the intended user?
- Is the writing too sophisticated or too simple, or does it vary from chapter to chapter?

These considerations are addressed before the document is submitted for its first review at your company. Our goal is to make sure the document flows smoothly, and therefore requires the least amount of changes from your staff.

The copy edit is a simpler, but still essential, part of the process. An experienced editor casts a fresh eye upon the text, not from a technical standpoint, but from a reader's standpoint. The copy editor becomes the audience's advocate during the document's construction. These are just a few of the questions an experienced copy editor asks while reviewing the new document:

- Do the sentences read clearly the first time through?
- Are the sentences grammatically correct?
- Is there a logical sequence to each paragraph and chapter?
- Are the paragraphs constructed in a hierarchical pattern so that each chapter has some resemblance to the next?
- Are the heading levels consistent and appropriate?
- Are fonts applied and maintained consistently throughout the document?

With experience gained from past projects, the copy editor may identify some interesting concerns about the logic and comprehensibility within the document. It's quite useful to obtain a layperson's reaction to the technical aspects of the document.

First client review: technical accuracy

Once our team reviews and revises the document, we'll submit it to your team for review. This review cycle has a very specific focus: technical content. Your staff doesn't need to spend any time looking for typos—those are flagged by the writing and editing staff as the document goes through its various revisions. Your team should spend precious review time checking the document to ensure that the most recent revisions to the software or the latest design elements of the product are accurately reflected in this version of the documentation.

Your staff might want to review the document by meeting in a group in a conference room all day and going over the document page by page. Perhaps some team members prefer to read the document privately. Everyone should write down their comments on a printed copy. We recommend that your team meet as a group for at least one session to compare everyone's comments, resolve conflicts, and assemble one master change copy. This process enhances the analytical aspect of the review process by promoting debate and requiring decisions on unresolved issues. It can also lessen our team's time expenditure, ensure accurate, complete, and coherent changes, and conserve project costs.

Develop editorial style sheet

If documentation was previously developed for the project, the editors collect common usages from the document to develop an editorial style sheet during the first client review cycle. They apply this information to the latest documentation written by the Underwhelmed team to ensure clarity, flow, and precision in usage.

Second draft

The second draft incorporates the client's review changes and any new information developed by your project team. As the software revisions continue and the GUI (graphical user interface) changes, or while your product continues to be engineered for final production, the Underwhelmed team meets regularly with yours to track the changes and ensure the product you are readying for market is accurately reflected in the document.

Second Underwhelmed edit: recheck editorial style

The Underwhelmed team completes all writing according to the project schedule and reviews the style and consistency in the latest additions and changes to the text. We work hard to make sure that everything presented to your staff for review is as clean and well edited as possible so they can focus on the substantive content and process issues. The style sheet provides the basis for making any decisions on how to present the material.

Second client review: recheck technical changes

Your team has a chance to look at the document in a more complete form this time. The deadline is looming, so there is pressure to do only a cursory document review. It is important for your project team to take a breath and find the time to check every detail. This is the review that makes all the difference to your customers. The document should be about 90 percent completed at this point. Most of the essential information about your product should be included. All the information should be discussed in a clear, concise, comprehensive manner. Is there anything missing from the document as it stands? Are there placeholders indicating what is missing, or is there a conceptual gap that no one has noticed until now?

Try to view the document as though you've never seen it before, you don't know what the product does, and you have to learn about it quickly. Try to find other people in the company who have some time and familiarity with the product, but who are not deeply involved in creating this document. They may be able to review it with a truly clear mind. This might be the one thing your team does that catches the important, missing element that your customers appreciate the most. Only your staff knows the product well enough to realize what could be most useful to your customer. Make use of their expertise.

Assemble the team once again to create a master draft copy, and return it to the Underwhelmed team for final changes and checking. If the latest software build is available, now is the time to submit it to the Underwhelmed team so they can check the accuracy of their work.

Final draft delivery and handoff

The Underwhelmed team incorporates all review changes from the master copy, studies the most recent design updates, and checks the document for completeness. If there is any missing information left to gather, we call your staff and get the answers.

At last, the document is complete. Layout, formatting, pagination, headers and footers, and all things graphical are addressed in final production. We take one last look to make sure the graphics are in the right place, the callouts and captions make sense, the page numbers are working properly, and the page breaks are appropriate. The Table of Contents, Lists of Tables and Figures, and the Index are generated and checked one last time. One more spell check is run. Sometimes, printing the document two or three times is required to get everything right.

Once a good print is generated (either to an EPS file or as hard copy, as defined in the project plan), the document might be converted to an Adobe Acrobat PDF file format so that it can be included on the CD-ROM or printed by your print service bureau or ours. We deliver the package in whatever format your team needs for maximum efficiency and minimum bother. Most importantly, we do everything in our power to get you the documentation your product deserves within budget and on time.

This process might seem a little daunting; however, it is our pleasure to provide you with these services. We enjoy all aspects of developing your documentation project from concept to completion, and look forward to working with you to make it happen. Nothing worthwhile is ever easy to produce, but if you hire the right team, you'll be amazed at how well things can go.