Modern Technical Communication Workflows
STC Roundtable, February 2020

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Obligatory “About Me” Slide

- Technical publishing consultant and trainer
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This Month in STC Roundtable

Modern Technical Communication Workflows

• February 7, 2020: Overview Webinar
• February 14: Workflow Information Resources
• February 21: Panel Discussion, Compare/Contrast Organizations’ Workflows (2 – 3:30 pm US Eastern Time)
• February 28: Audio Interviews
What do we mean by “Workflows”?

• Workflow: A process for getting things done.

• Technical communication workflow: An organization’s process for conceiving, creating, managing, delivering, and translation technical content.
Phases of the Technical Communication Workflow

- Project initiation
- Initial research
- Content development
- Version and source management
- Publishing
- Translation management
It’s our ecosystems!

Photo by Elke Karin Lugert on Unsplash
Project Initiation

• Formal or ad hoc

• Representation at kick-off meeting?
Initial research

- Audience analysis
- Feature analysis
- Task analysis
Content Development

• Working with SMEs
• Working with the product
• Authoring tool and approach:
  ▪ XML vs legacy
  ▪ Structured vs unstructured
  ▪ Topic-oriented vs chapter-oriented
Version and Source Management

- Defect tracking
- Source control
- Review and approval
- Release management
- Variation management
- Metadata management
Publishing

PDF?
HTML?
Multi-channel?
Voice/chatbots?
Translation Management

Localization vendor hand-off
Translation memory management
Globalization considerations
Native language publishing
What influences technical communication workflows?

- Organizational culture
- Business requirements
- Business processes
- Customer needs
- History
Organizational culture

- Siloed or collaborative?
- Developer-centric or marketing-centric?
- Hierarchical or flat?
- Preference for general-purpose or specialized tools?
- Preference for off-the-shelf or open-source solutions?
- Risk-tolerance
Business requirements

• Product release cycle
• Resource availability
• Product variations
• Market: Domestic or global?
• Reporting/auditing/compliance
• Certifications (ISO 9001)
Business processes

- Team composition
- Product lifecycle
- Development methodology
- Budgeting and reporting
Customer needs

- Representative users and tasks
- User preferences/requirements
- Preferred language
- Context of use
"We’ve always done it this way"
New requirements get piled on to existing processes

• Global marketplace
• Product line expansion
• Multi-channel delivery
• Content customization and personalization
• Chatbot and voice interactions
Do your workflows support your customers and your business?

Can we get a slightly darker table border in our PDFs?

Organization that publishes tens of thousands of pages of reference documentation in PDF format.
Do your workflow priorities change as your users change?

I had just finished interviewing some very nice, very experienced people from two massive Silicon Valley companies [...] They were proud that their page numbers were laid out recto-verso. None of them seemed to give any thought to their readers' actual needs, preferring their own criteria for what constituted a job well done. They used phrases like "clear, concise, correct, and complete" and avoided words like "searchable," "scannable," "attractive," and most egregiously, "useful."

Andrew Etter, Modern Technical Writing: An Introduction to Software Documentation
Is your team invested in your workflows?

Writer: “I went through our documentation and made the topic headings more consistent. And my manager got angry with me!”
Is your team invested in your workflows?

Writer: “I went through our documentation and made the topic headings more consistent. And my manager got angry with me!”

Manager: “One of our writers edited our finalized content. And cost us hundreds of dollars in unbudgeted translation expenses!”
Special Cases and Challenges

Design requirements
Supporting multiple concurrent product versions
Supporting product variations
Localization
User-generated content
Collaboration among authors
Ensuring consistency

And many others!
Questions

How closely do you work with your product development team? Are you or your writers tightly integrated with the entire product development lifecycle?

Do you have opportunities to learn about the needs, preferences, and requirements of your readers?

Does your organizational culture support collaborative involvement with all aspects of product development? Do you get appropriate support from subject-matter experts, your product teams, and management?
Questions

How well-defined are your processes for:

• Defining documentation deliverables?
• Review and approval
• Defect reporting and tracking
• Version control and source file management
Questions

Are there any components of your documentation workflow that don’t provide value to your organization or to your customers?

What requirements does your organization impose that complicate your documentation workflow?

What things do you do because “we’ve always done it this way”? 
Resources
Modern Technical Writing

< An Introduction to Software Documentation >

Andrew Etter
DOCS LIKE CODE
Write, review, test, merge, build, deploy, repeat.

BY ANNE GENTLE

Foreword by Eric Holscher
Resources

• *Modern Technical Writing: An Introduction to Software Documentation*, Andrew Etter

• *Docs Like Code*, Anne Gentle

• *Content Strategy: Connecting the dots between business, brand, and benefits*, Rahel Bailie and Noz Urbina

• *Content Everywhere: Strategy and Structure For Future-Ready Content*, Sara Wachter-Boettcher

• *Content Strategy 101*, Sarah O’Keefe and Alan Pringle
I hope you enjoyed this webinar!

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