

Tools that Work

Project management for technical communicators

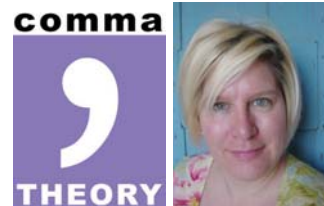
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What's in it for you?

- Efficiency
- Project knowledge
- Professional consistency
- Confidence
- Income
- Respect



Tools

- Your professional knowledge
- Project metrics
- Service level agreement
- Communication
- Review process
- Publishing
- Delivery
- Post-delivery de-briefing
- Project tracking

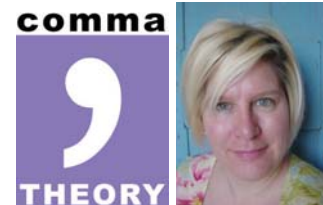
Processes in a workflow



Know your product

This documentation option:	Serves this purpose:	And is created by:
Administration guide	A guide for administrators and technical end users.	Documentation services
RunBook	An administration guide which contains procedures to start, stop, and supervise a system.	Documentation services
Frequently asked questions (FAQs)	A list of frequently asked questions which are HTML coded and posted on the product Web page for easy access.	Documentation services
Product brief	An information brief for a technical or non-technical target; used for internal and external marketing.	Corporate communication services
Knowledge learning module	An interactive, self-paced tutorial for technical or non-technical end users, as required.	Training services

Create a documentation matrix that fits your work situation.



Know your ability

- How long for the research segment?
- How long to learn the product or tool?
- How long for the draft segment?
- One draft or two before review?
- How many reviews?
- Do I need another pair of eyes?

Create a list of questions to define your work.



Know the project

- What is the target audience?
- What is the estimated page count?
- How well is the project planned?
- It is a team?
- Do they need a walkthrough?
- How long do they need for review?
- Will they allow one review?

Create a list of questions to define the project.



Understanding project metrics

Three pages

/

Six-hour day

+

Contingency

Things change.

Contingency = 5–10% of total, depending on risk.

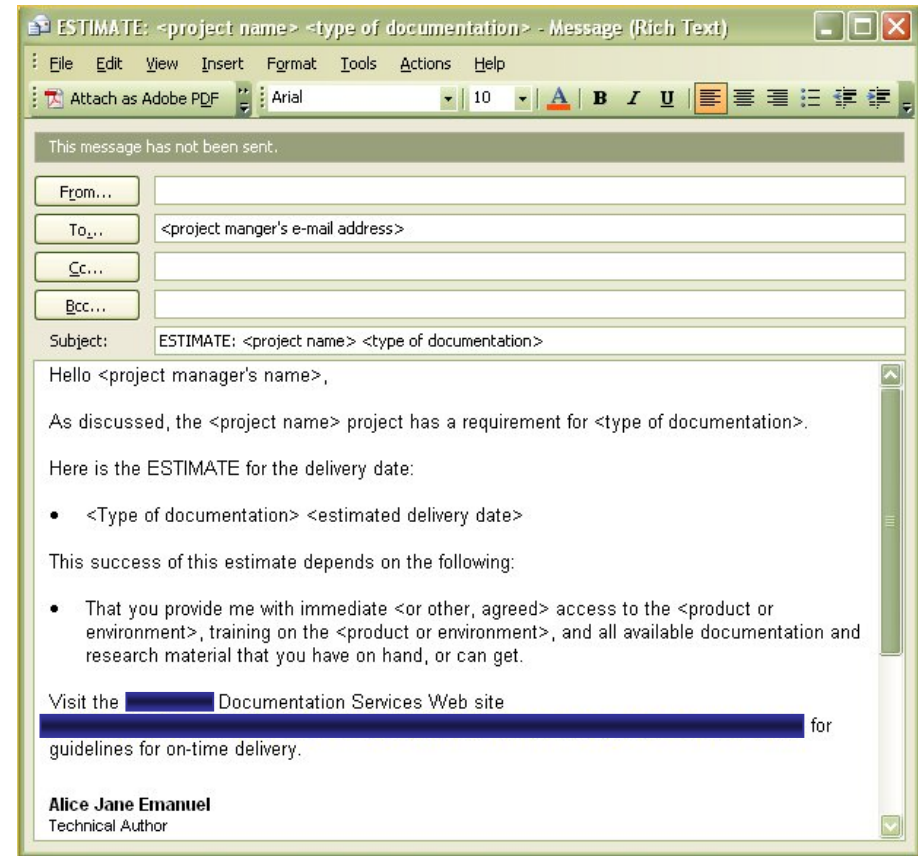
Do not disclose the project metric you use.

comma



Developing a Service Level Agreement

- Call or walk over first to discuss it.
- Include:
 - The product
 - Dates
 - What the client must provide
 - What to expect next








Create an SLA process.

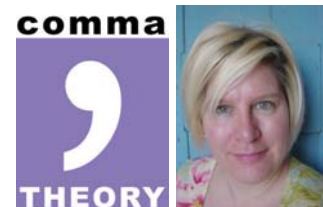


Relentless follow up

- The SLA and any adjusted SLAs are the most important communication items
- Communication is key to a smooth process:
 - First, in person or over the phone
 - Second, in writing
- Always follow-up conversations in writing.

 <project manger's e-mail address>	RESPONSE: Scope & Approach <project name> <type of documentation>
 <project manger's e-mail address>	PUBLISHED: <document PDF file name.pdf>
 <SME's e-mail address>	DRAFT for REVIEW: <document file name.doc>
 <project manger's e-mail address>	ADJUSTED estimate: <project name> <type of documentation>
 <project manger's e-mail address>	ESTIMATE: <project name> <type of documentation>

Create a communication process.



Production process

- Research and learn
- Write
- Illustrate
- Edit
- Prepare draft for review



Create a production process.



Review process

- Explain the review process up front:
 - SME review
 - One review meeting
 - Publish
- Drive the SME review turnaround time.
- Drive the review meeting.
- Conduct the review with real-time updates
 - Use WebEx, MS NetMeeting, Skype

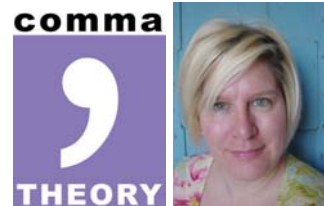
Create a review process.



SME review period

<u>This number of pages in one document:</u>	Allow the SME this amount of time to review:
Up to 50 pages	Two working days
50–100 pages	Three working days
100+ pages	Four to five working days

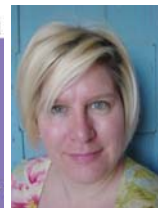
Offer to go through the material with the SME: Review Coach.



Finalize and publish

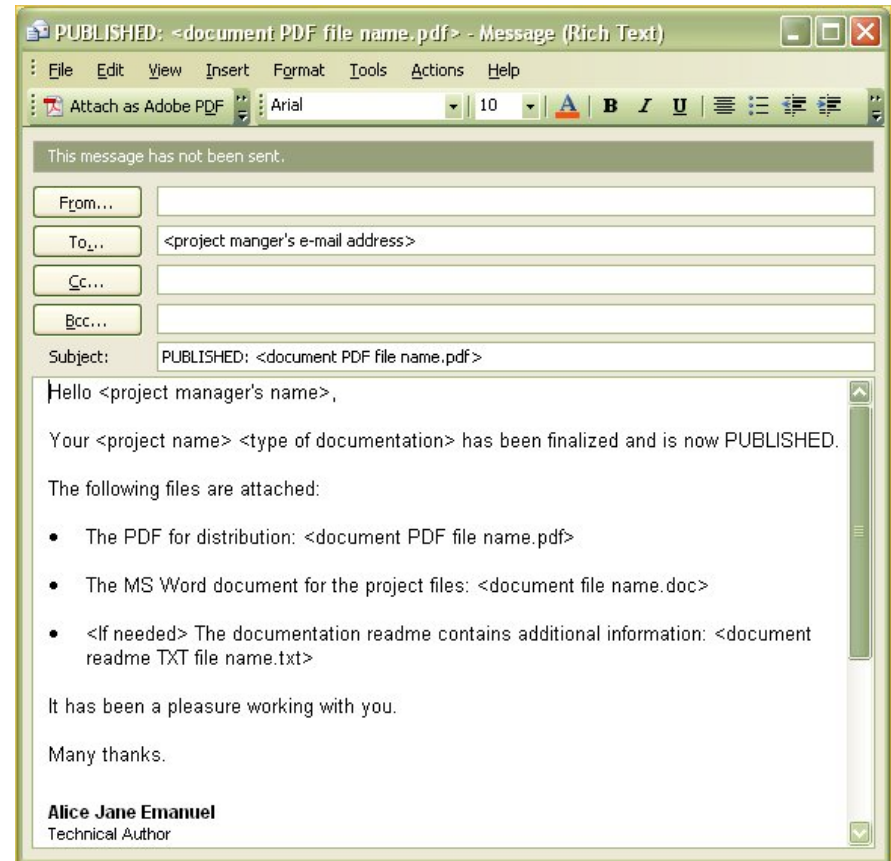
<u>This number of pages in one document:</u>	Requires this amount of time to finalize and publish:
Up to 50 pages	One eight-hour day
50–100 pages	Two eight-hour days
150–250 pages	Three eight-hour days
250–350 pages	Four eight-hour days

Create a finalize-and-publish process.

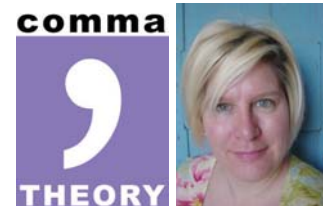


Deliver

- Do not widely release drafts of a document prior to delivery.
- Deliver succinctly, and with authority.



Create a delivery process.



Within one week: De-brief

- Contribute lessons learned from the project to the:
 - Project manager
 - Documentation process
 - Project process
 - Any other related process, as needed.

- Discuss first, follow up in writing.

Create a de-brief process.



Tracking

- Update your tracking once a day.
- Track real time.
- Use the gaps.

- Communicate changes promptly.
- Defend your schedule in real terms.

Create a tracking process.

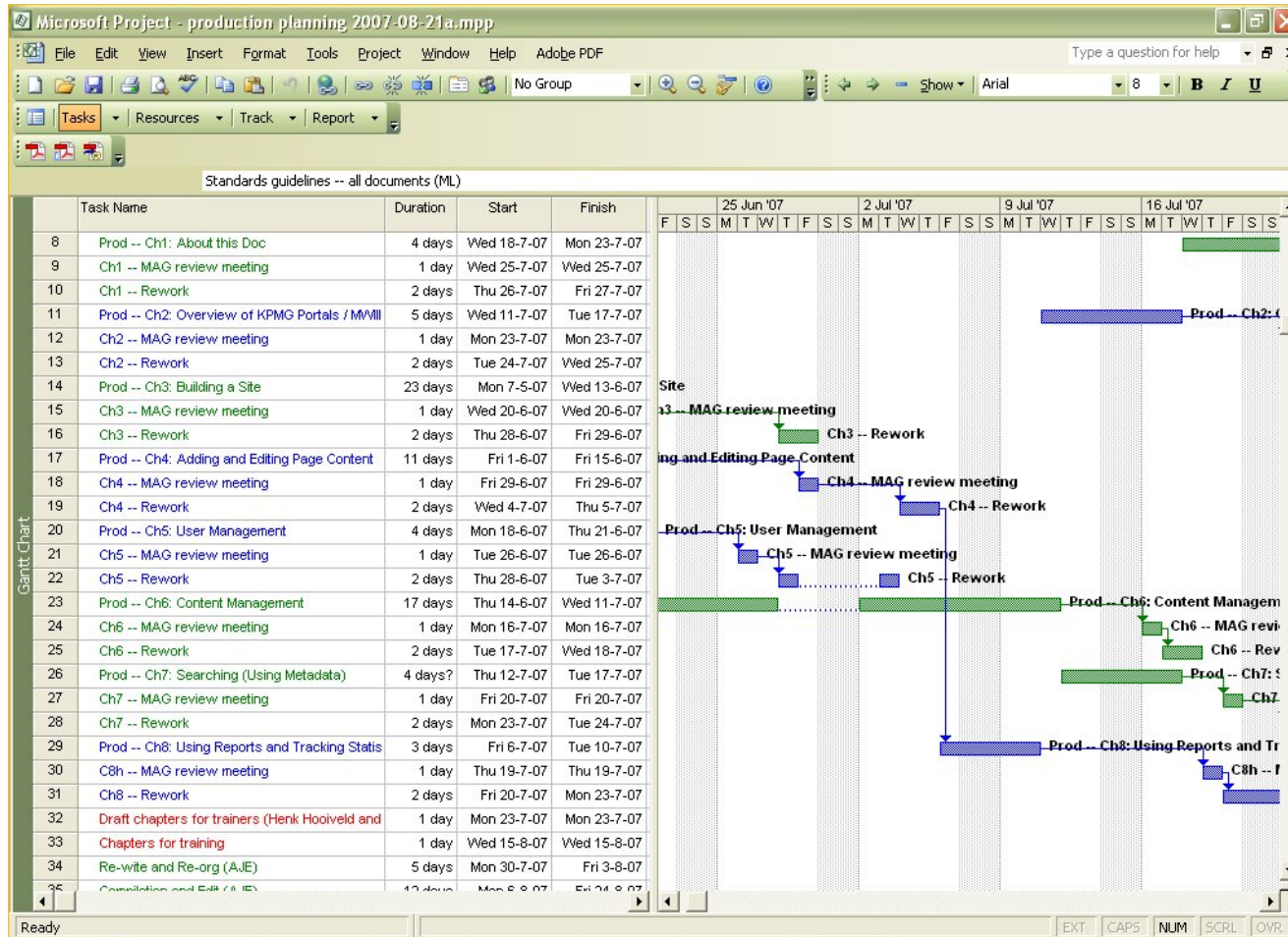


Project tracking tools

- MS Project
- Presentation
- Spreadsheet
- Google Calendar
- MS Outlook
- Magnets on a whiteboard



MS Project



Presentation

Documentation—Deployment Package

R

A

G



◆ Status:

- [redacted] Administration Guide:
 - PUBLISHED and available.
- [redacted] OnBoarding Process:
 - FINAL pending approval.
 - Approval source: [redacted] Site Collection Owner.
- [redacted] Best Practice Guide:
 - FINAL unless more information arrives from other sources.
- [redacted] Site Consistency Guideline Template:
 - DRAFT.
 - Information source: [redacted]
- [redacted] Country Project Template:
 - FINAL and ready to publish.

◆ Issues:

- [redacted] Administration Guide:
 - Small changes coming to this document.
- [redacted] Best Practice Guide
 - Scope creep.
- To begin alignment of documents for the deployment package:
 - All documents must be FINAL and ready to publish.
- [redacted] Adoption Process Web site:
 - Not yet published.
 - Information source: [redacted]

◆ Next Steps:

- Collect finalised documents for the deployment package.
- Being to align documents in the deployment package.

1




MS Outlook on the Internet

Address <http://dhegarty.com/> Go

The coming days... The coming weeks...

Overloaded
 Busy
 Fairly Busy
 Fairly Idle
 Idle



www.dhegarty.com 10.04.08 19:30:15

This calendar indicates when I could be available.
 But 'not unavailable' is not the same as 'available'.
 A lack of appointments does not mean I am sitting around admiring the clouds and twiddling my thumbs.

If you are using Microsoft Outlook, you can add 'Free/Busy' information to my contact details. (in the Contacts folder, open my contact. On the details tab, under the heading 'Internet Free-Busy', in the 'Address' box, add '<http://www.dhegarty.com/html/calendar/dhegarty.vfb>'.

To avoid disappointment, please check, if possible, before making appointments on my behalf.

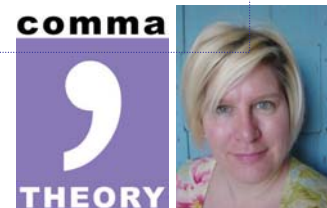
April 2008

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
31	1	2	3	4	5	6
	14:00 - 18:00 Tentative (Tübingen) 20:00 - 23:00	20:00 - 23:00 Tentative (Tübingen)	07:45 - 08:15 Tentative (Tübingen) 09:30 - 10:00	07:45 - 08:15 Tentative (Tübingen) 09:30 - 10:30		



Further reading

Further reading	Description	Link
The Project Management Institute (PMI)	PMI publishes standards related to project management and manages project management certification. (from Wikipedia)	http://www.pmi.org
The Deadline by Tom DeMarco	A novel about project management.	http://www.systemsguild.com/GuildSite/TDM/Deadline.html
STC	Follow trends and learn from dedicated professionals in STC.	http://www.stc.org http://www.stc.org/membership/sigLinks01.asp
Other associations	Follow trends and learn from dedicated professionals in other associations.	Google your country. Google your area of specialisation.
Online forums and MVP sites for tools and techniques	Places where like-minded professionals share knowledge.	Google your tool or technique.



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Thank you!

