Tools that Work

Project management for technical communicators
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

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

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?
- Is it 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.
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.

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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.

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

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

Offer to go through the material with the SME: Review Coach.
## Finalize and publish

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

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

#### Task Details

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pred -- Ch1: About this Doc</td>
<td>4 days</td>
<td>Wed 18-7-07</td>
<td>Mon 25-7-07</td>
</tr>
<tr>
<td>Ch1 - MAU review meeting</td>
<td>1 day</td>
<td>Wed 25-7-07</td>
<td>Wed 25-7-07</td>
</tr>
<tr>
<td>Ch1 - Rework</td>
<td>2 days</td>
<td>Thu 26-7-07</td>
<td>Fri 27-7-07</td>
</tr>
<tr>
<td>Ch1 - Owning IPM Portfolio</td>
<td>6 days</td>
<td>Wed 11-7-07</td>
<td>Tue 17-7-07</td>
</tr>
<tr>
<td>Ch1 - MAU review meeting</td>
<td>1 day</td>
<td>Mon 25-7-07</td>
<td>Mon 25-7-07</td>
</tr>
<tr>
<td>Ch1 - Rework</td>
<td>2 days</td>
<td>Tue 24-7-07</td>
<td>Wed 26-7-07</td>
</tr>
<tr>
<td>Pred -- Ch2: Building a Site</td>
<td>23 days</td>
<td>Mon 7-8-07</td>
<td>Tue 13-8-07</td>
</tr>
<tr>
<td>Ch3 - MAU review meeting</td>
<td>1 day</td>
<td>Wed 18-8-07</td>
<td>Wed 18-8-07</td>
</tr>
<tr>
<td>Ch3 - Rework</td>
<td>2 days</td>
<td>Thu 29-8-07</td>
<td>Fri 29-8-07</td>
</tr>
<tr>
<td>Ch1 - Adding and Editing a Page Content</td>
<td>11 days</td>
<td>Fri 1-9-07</td>
<td>Tue 15-9-07</td>
</tr>
<tr>
<td>Ch1 - MAU review meeting</td>
<td>1 day</td>
<td>Fri 25-9-07</td>
<td>Fri 25-9-07</td>
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<tr>
<td>Ch1 - Rework</td>
<td>2 days</td>
<td>Mon 28-9-07</td>
<td>Tue 28-9-07</td>
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<tr>
<td>Ch1 - Owning IPM Portfolio</td>
<td>17 days</td>
<td>Mon 14-10-07</td>
<td>Wed 17-10-07</td>
</tr>
<tr>
<td>Ch1 - MAU review meeting</td>
<td>1 day</td>
<td>Mon 17-10-07</td>
<td>Mon 17-10-07</td>
</tr>
<tr>
<td>Ch1 - Rework</td>
<td>2 days</td>
<td>Wed 20-10-07</td>
<td>Thu 21-10-07</td>
</tr>
<tr>
<td>Pred -- Ch2: User Management</td>
<td>4 days</td>
<td>Thu 22-10-07</td>
<td>Thu 29-10-07</td>
</tr>
<tr>
<td>Ch2 - MAU review meeting</td>
<td>1 day</td>
<td>Wed 31-10-07</td>
<td>Wed 31-10-07</td>
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<tr>
<td>Ch2 - Rework</td>
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<td>Thu 1-11-07</td>
<td>Fri 2-11-07</td>
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<tr>
<td>Pred -- Ch2: Content Management</td>
<td>17 days</td>
<td>Mon 14-11-07</td>
<td>Wed 17-11-07</td>
</tr>
<tr>
<td>Ch2 - MAU review meeting</td>
<td>1 day</td>
<td>Mon 18-11-07</td>
<td>Mon 18-11-07</td>
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<td>Ch2 - Rework</td>
<td>2 days</td>
<td>Wed 21-11-07</td>
<td>Thu 22-11-07</td>
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<tr>
<td>Pred -- Ch3: Searching (Using Metadata)</td>
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<td>Thu 12-12-07</td>
<td>Thu 19-12-07</td>
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<tr>
<td>Ch3 - MAU review meeting</td>
<td>1 day</td>
<td>Fri 20-12-07</td>
<td>Fri 20-12-07</td>
</tr>
<tr>
<td>Ch3 - Rework</td>
<td>2 days</td>
<td>Mon 23-12-07</td>
<td>Tue 24-12-07</td>
</tr>
<tr>
<td>Pred -- Ch3: Using Reports and Tracking Status</td>
<td>3 days</td>
<td>Mon 27-12-07</td>
<td>Mon 27-12-07</td>
</tr>
<tr>
<td>Ch3 - MAU review meeting</td>
<td>1 day</td>
<td>Mon 30-12-07</td>
<td>Mon 30-12-07</td>
</tr>
<tr>
<td>Ch3 - Rework</td>
<td>2 days</td>
<td>Thu 02-01-08</td>
<td>Fri 03-01-08</td>
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<tr>
<td>Draft chapters for trainers (Hank, Rockwell)</td>
<td>3 days</td>
<td>Mon 13-01-08</td>
<td>Mon 13-01-08</td>
</tr>
<tr>
<td>Chapters for training</td>
<td>1 day</td>
<td>Wed 15-01-08</td>
<td>Wed 15-01-08</td>
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<tr>
<td>Redrafting and Re-organizing (AUC)</td>
<td>3 days</td>
<td>Thu 16-01-08</td>
<td>Thu 16-01-08</td>
</tr>
<tr>
<td>Redrafting and Re-organizing (AUC)</td>
<td>3 days</td>
<td>Thu 16-01-08</td>
<td>Thu 16-01-08</td>
</tr>
</tbody>
</table>
Presentation

Documentation—Deployment Package

**Status:**
- Administration Guide: PUBLISHED and available.
- On-Boarding Process: FINAL pending approval.
- Approval source: Site Collection Owner.
- Best Practice Guide: FINAL unless more information arrives from other sources.
- Site Consistency Guideline
- County Project Template: FINAL and ready to publish.

**Issues:**
- Administration Guide: Small changes coming to this document.
- Best Practice Guide: Scope change.
- To begin alignment of documents for the deployment package:
  - All documents must be FINAL and ready to publish.
  - Adoption Process Web site:
    - Yet to be published:
    - Information source:

**Next Steps:**
- Collect finalised documents for the deployment package.
- Begin to align documents in the deployment package.
MS Outlook on the Internet

The coming days...

- Overloaded
- Busy
- Fairy Busy
- Fairy Idle
- Idle

The coming weeks...

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.vib'.

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

April 2008

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td></td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>31: 14:00 - 18:00  Tentative (Tübingen)</td>
<td>20:00 - 23:00</td>
<td>07:45 - 08:15  Tentative (Tübingen)</td>
<td>09:30 - 10:00</td>
<td>07:45 - 08:15  Tentative (Tübingen)</td>
<td>09:30 - 10:00</td>
<td>0</td>
</tr>
</tbody>
</table>
## Further reading

<table>
<thead>
<tr>
<th>Further reading</th>
<th>Description</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Project Management Institute (PMI)</td>
<td>PMI publishes standards related to project management and manages project management certification. (from Wikipedia)</td>
<td><a href="http://www.pmi.org">http://www.pmi.org</a></td>
</tr>
<tr>
<td>STC</td>
<td>Follow trends and learn from dedicated professionals in STC.</td>
<td><a href="http://www.stc.org">http://www.stc.org</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="http://www.stc.org/membership/sigLinks01.asp">http://www.stc.org/membership/sigLinks01.asp</a></td>
</tr>
<tr>
<td>Other associations</td>
<td>Follow trends and learn from dedicated professionals in other associations.</td>
<td>Google your country.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Google your area of specialisation.</td>
</tr>
<tr>
<td>Online forums and MVP sites for tools and techniques</td>
<td>Places where like-minded professionals share knowledge.</td>
<td>Google your tool or technique.</td>
</tr>
</tbody>
</table>
Project management for technical communicators

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Thank you!