



# When Clear Communication Matters

## Take the time to put together a documentation strategy

By Steven Iverson

Anyone who works with documentation, either on paper, on the Web or for training, has been faced with an increasing number of choices and challenges. You have to decide how to present your documentation to your audience, which requires that you not only understand their background and education level, but also their ability to access the necessary technology (e.g., having a CD-ROM drive in their computer, being able to open a PDF). In addition, the question of how to streamline content creation has

forced documentation managers to examine the way that documents are created within an organization. Finally, the choice of what language(s) to use to present the information has led many to step back and consider the steps involved in the development of a long-term documentation strategy.

Ten years ago, a documentation strategy was not very common. Projects were developed in isolation, perhaps by product family, and the presentation choices were limited. English was most often the language of choice, and paper was still

an effective delivery method. With the changes in technology, sophistication and demographics, the issues have changed drastically. And now that translation of content has become so common, it must be considered part of a single process, and not just an 'add-on' or an afterthought to deal with when the English is written.

In developing a strategy, the most effective documentation managers evaluate how best to develop and deploy their creations. Looking at the most critical aspects of the process allows you to find synergies within your company, and select appropriate resources outside of the organization to assist in a well thought-out, logical documentation strategy.

### The integral parts of a documentation strategy

What are the main components of a long-term documentation strategy? First, you need to consider the audience for whom this documentation is created. This target audience may differ by department or product. But strategically, you need to know a great deal about your target audience: education level, preferences in terms of delivery (paper versus CD versus Web), and presentation (point size, use of graphics over text, etc.). Keep in mind that if you are providing your documentation in other languages, your target audience may be different. Education levels of your target audience may differ from your domestic audience, and their access to technology such as CD-ROM drives and the Internet may be different. The person using your equipment in another country may be different (e.g., while in the United States a nurse may take your blood pressure, in Germany it might be likely that it would be a doctor). To complicate matters, your foreign language audience may have different characteristics in the United States versus internationally. In the U.S., your readers might be used to seeing things priced in U.S. dollars, while documentation for other countries would need to reflect the corresponding currency.

You also need to know your target audience's primary language. Even though you create your material in English, with the changing demographics of the United States it is increasingly likely that you will need it in at least one other language. Your

ability to plan for this possibility suggests that you use a format that will allow for the expansion of text that most other languages bring, and that you control the creation of content to avoid duplication and unclear text which would lead to higher translation costs. You might also be able to find ways to make similar passages in your text more consistent, allowing you to take advantage of translation memory tools to increase your re-use of previously translated material.

Another component of a long-term documentation strategy involves looking at your 'content creators.' These are the people who contribute to, or edit, your content. They might be technical communicators, but they might also be engineers, graphic artists, subject-matter experts or copy editors. It is important from a standpoint of style and consistency to have a style guide in place to address issues such as formatting, including standard templates for each type of page you create, while also addressing issues such as how to write the text (using the passive or active voice, including callouts in graphics, etc.). In addition, if you do any type of translation, your style guide should address issues related to other languages. For example, will you leave '800' numbers in the text, even though they might not work from the location in question? And, will you put all measurements in metric only, or as a combination of metric and U.S. measurements?

Finally, it is important to look at the process involved in creating copy within your organization. It would be wise to make a list of all the people who contribute to creating content, and determine the process by which they create or edit the copy that you are producing. You may find inefficiencies and redundancies in the process which can be eliminated or streamlined. Perhaps instead of organizing documentation by product, it would be wise to organize it by type of document (owner's manuals versus parts catalogs). Or maybe you want to have someone who focuses on updates, and someone else who creates all new content.

Many companies are now finding that a content management system is a wise investment. Typically, a content management system will help you systematically create new copy and re-use already existing copy in English. There are many good products on the market, but as with any software tool, the key is in the people who will be using it. While a content management system can effectively streamline your process, you need to train your "copy cre-

## A Content Management System (CMS) Primer

### **Q: What is a Content Management System, or CMS?**

A: At the risk of stating the obvious, it could be said that a content management system is quite simply—a system that manages content. However, it is precisely the obviousness of what a CMS is and does, that has created a degree of confusion amongst 'would be' purchasers of such a system. Wrapped up in a seemingly harmless statement is enough ambiguity to enable desperately inappropriate products to masquerade as content management solutions.

To fully understand what it is a CMS does, we have to first define a) what it is we are referring to when we talk about content b) what it is we understand under its management and c) what do we mean by a system.

### **Q: What is Content?**

A: Content is in essence, any type or 'unit' of digital information that is used to populate a page. It can be text, images, graphics, video, sound etc - or in other words - anything that is likely to be published across an inter-, intra- and/or extranet.

### **Q: What is Content Management?**

A: Content Management is effectively the management of the content described above, by combining rules, process and/or workflows in such a way that centralized webmasters and decentralized web authors/editors can create, edit, manage and publish all the content of a web page in accordance with a given framework or requirements.

### **Q: What is the CM System?**

A: The system itself is definable as a tool or combination of tools that facilitate the efficient and effective production of the desired web pages using the managed content.

To combine all three, we can say: "A CMS is a tool that enables a variety of (centralized) technical and (de-centralized) non-technical staff to create, edit, manage and finally publish a variety of content (such as text, graphics, video etc), whilst being constrained by a centralized set of rules, process and workflows that ensure a coherent, validated website appearance."

Source: [www.contentmanager.eu.com](http://www.contentmanager.eu.com).

ators" to work in such a way that you'll achieve maximum efficiencies with the system. This can be the most daunting part of the process. These systems often require writing in "chunks" of information, instead of pages and chapters. Each chunk must be able to stand on its own, so that when it is re-used, no contextual pieces are missing. One caveat... don't let software dictate your process. Map your content creation process first, make any changes necessary to your workflow, and then find a software tool that will help you streamline a process with which you are already happy. Make the software serve your process, and don't adapt your process to the software unless it's a legitimate improvement.

Once you have control over the English content, you need to think about how to handle the foreign language aspects of the project, keeping in mind that this is just one more step in the content creation process, and not necessarily an extra step. If you have done your long-term planning correctly, you will have anticipated the need for translation. This means that the format of your documents will easily adapt to languages that take up more space than the English, that you have addressed cultural concerns such as color and the use of imagery, and that your style guide defines how to deal

with issues such as measurements, currency and date formats.

Most companies find it more cost-effective to outsource the process of translation. If this is your choice, there are several items to keep in mind when looking for an effective partner. First, find a company that can handle all of your needs. This might include translation and desktop publishing, as well as management of your foreign language content through the use of translation memory. The company should also have a defined plan for its own growth, so that it can meet your long-term as well as your short-term needs.

In addition, you'll want to question your language partner's quality process. It should be clearly defined and documented for each project. They probably won't need to be ISO certified, but they should comply with the spirit of the process, meaning that all major operations are documented and reproducible. Look for someone who is willing to analyze your needs, and review your entire process, so that they can be valued member of your documentation team, even if they are not in-house. This kind of relationship can be invaluable to your long-term strategy. **WR**

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