From the Director

JoAnn Hackos

Welcome to the first issue of Best Practices, the newsletter of the Center for Information-Development Management. Throughout my years of consulting work in documentation, training, and customer service, I have consulted with hundreds of managers on Process Maturity, benchmarking, and product evaluations. In recent years I’ve noticed a growing trend in documentation and training groups: managers are increasingly expected to do more and more with fewer and fewer resources. In addition to having to evaluate and implement the recent surges in tools and technologies, and fighting to secure a staff with the right skills to meet their organization and customer needs, managers are expected to align themselves with increasingly complex corporate goals and to maintain professional levels of understanding regarding other organizations’ practices and processes.

People are available who can provide information, support, and expertise in these areas challenging managers. They include industry commentators, consultants, advisors, and, best of all, peers. Information resources in magazines, journals, and on the web are also available. However, managers do not have the time, limitless funds, contacts, or internal support to find and tap into all the useful resources available. I have found over and over that managers desire two distinct types of information. First, they want informed, low-cost, well-researched, and quick answers to the day-to-day questions facing their organizations, and second, they want guidance in identifying the long-term and broader issues on which to focus.

Adding to the challenge, our industry has no elite body of experts, no group of industry leaders, no broad strategic vision readily available to support information-development, training, and customer-service managers. There are few leaders working together to pull into one place the ideas, trends, and discussions that we might use to draw conclusions and provide direction. Aside from conferences, management information is primarily shared through informal exchanges. As a result, we lack reliable sources of well-researched and filtered information that we can use to identify best practices within the field.

The Center for Information-Development Management fills this industry void. The Center brings together a core group of executive-level Associates and an Advisory Council of senior managers that can support information-development, training, and support managers in achieving success.

The Center is an interactive and comprehensive resource of management information for information-development, training, and customer service managers across North America and internationally. Our aim is to provide a committed, focused, and expert forum to support managers in creating the highest performance teams that produce effective and top quality information products. To meet this goal, we have initiated the following missions:

♦ The Center conducts benchmark studies on how best to manage the development of information, training, and support resources.
The Center collects, evaluates, and disseminates information from a wide variety of sources.

The Center provides a forum for managers to study, investigate, and discuss the issues facing them as well as a forum to learn from one another’s successes and failures.

Over the past eighteen months, during the Center’s conceptual phase, my team at Comtech and I have engaged in a series of independently sponsored and group-sponsored benchmark studies. Our topics have ranged from evaluating organization structure to determining appropriate staffing levels. For each topic we investigated, we found that benchmark partners could benefit from the insights we gained from other studies they may not have participated in. We also noted that many managers who had wanted to participate directly in the benchmark studies were unable to do so at a particular time. Nevertheless, they wanted access to the studies and other information about critical management issues. To respond to these information needs, the Center will focus on benchmarking studies that lead to the identification of best practices.

As a result of years of observation and data collection, the Center begins with a significant body of information addressing current challenges. Future benchmarking studies will add significantly to this information. By establishing a group of members interested in learning best practices from one another, the Center provides for the widespread distribution of strategies for increasing staff productivity and information, training, and support quality.

The Center’s information outlets are wide and varied; they facilitate those two types of information identified earlier—immediate and strategic. Center members will have access to a moderated email list-serv, weekly Internet chat sessions hosted by me or one of the other Center Associates, and a member’s only section of the Information Management Center website. The website contains abstracts of research publications, book reviews, a manager’s calendar, archives of list-serv and chat discussions, and much more. All of these outlets will provide managers with the opportunity to seek expert guidance on day-to-day issues of managing information-development, training, or customer service groups. Members will also receive valuable information that will help them focus the direction of their groups in this bi-monthly newsletter, industry benchmarking reports, an annual conference, and a series of white papers.

Future editions of the Best Practices newsletter include:

- feature articles about documentation, training, and support by Center Associates
- descriptions of higher education programs in the field to help you to evaluate and perhaps even recruit future employees
- reviews of new and existing tools and technologies that might be of use in training, documentation, and support groups
- book and website reviews to help you sort through the mass of information available
- abstracts of journal and feature articles of interest to senior documentation, training, and support managers
- a calendar of events, expos, and conferences of interest to managers
- benchmark updates and announcements

The annual Best Practices conference will bring together consultants and senior managers to discuss the issues facing them and how we might approach those issues to ensure highly effective and cost-efficient documentation, training, and customer service products. Finally, Center members will receive discounts on all consulting work conducted by me, the Center Associates, or my team at Comtech.

I know you’ll recognize the benefits that an organization like the Center can bring to you and your group. By joining the Center and participating in its funded activities, you will be able to

- compare your organization to your competitors and to those that are best in class
- learn about industry best practices
- keep in touch with industry trends
- avoid costly mistakes by learning from other managers’ experiences
- save time and effort on independent research
- educate new and potential managers in your organization
- obtain consulting and other services at a special discount rate
Joining me as Center Associates are Henry Korman of WordPlay Communications, Katherine Brennan Murphy of Tapestry Communications, and Ann Rockley of the Rockley Group. For more than 25 years, Henry Korman has focused on making technology accessible to everyone via smart production design, interactive information systems, online help facilities, and lean paper and online documentation. Katherine Brennan Murphy opened Tapestry Communications after 20 years as an information designer, technical publications manager, technical writer, training designer, and senior manager at Tektronix. She provides clients a suite of services to help them improve clarity and creativity in their organizations, including workflow redesign, management consulting, and human factors research and design. President of The Rockley Group, Ann Rockley has 15 years’ experience developing all types of online documentation. She is an internationally acclaimed lecturer and practitioner of tools and technologies.

The Associates and I are aided by an advisory council which, to date, includes esteemed documentation and training managers Julie Bradbury of Cadence Design Systems, Robin Reddick of BMC Software, and Deborah Rosenquist of Dell Computers.

Together, we share in the excitement of helping you to help the Center achieve the visionary status we have laid out above. The success of the organization is contingent upon the participation of key managers like yourself. As just a small sample of the benefits that participation in the Center brings, we will be sending you another complimentary copy of Best Practices within the next six to eight weeks.

If you have any questions about the Center or Center membership, please feel free to contact me at 303/232-7586, or send email to joann.hackos@comtech-serv.com or info@infomanagementcenter.com.

ASSOCIATE PROFILE

Katherine Brennan Murphy

This is a year of new beginnings for Associate, Katherine Brennan Murphy. In December, she left Tektronix after nearly ten years to open her own firm, Tapestry Communications. Yes, the name was inspired by the Carole King song but as Murphy says “I offer clients a suite of services whose foundation rests on technical communication, human factors research, and systems engineering methods, which I see as an interconnected, intricate tapestry.”

Murphy, who holds a MS in Technical Communication and a BA in Anthropology (both from the University of Washington), has until now always worked for large organizations. In high school and college she worked in libraries and in temporary clerical positions. She notes that much of her strength as an innovative and effective manager came from learning the organizational disciplines these jobs require. After receiving her bachelor’s degree, Murphy worked for AirBorne Freight Corporation and the Boeing Company.

As a Lead in AirBorne’s accounting department, Murphy got her first taste of management (and at 23 felt that perhaps she needed to be older). She also had a chance to work with large databases and, in response to her employees’ requests, to redesign data entry screens. At Boeing, Murphy followed in her father’s footsteps and became a technical writer. She worked on one of the earliest Management Information Systems built in the U.S. She developed a method for executives to enter their confidential data directly into Microsoft Word. The method worked but she found that, in addition, she had to teach these men how to type!

While at Boeing, Murphy became a member of the Society for Technical Communication and realized that she needed more training to advance in the field. She was
accepted into the Master's program at University of Washington where she taught technical writing to engineering undergraduates and managed the department's computer lab. In her spare time, she worked on usability tests at Microsoft with Judy Ramey. In her thesis she used systems engineering methods to discover better strategies for managing the computer lab; the department implemented many of her recommendations after she graduated.

After graduation, Murphy accepted a senior writer position with Tektronix in the Portland, Oregon, metropolitan area. After a few months in this job, Murphy was offered the chance to manage once again. Over the next seven years, she managed up to 20 employees in a large department devoted to writing user and service manuals for high-end test and measurement equipment. This job, while sometimes stressful, gave her the opportunity to manage all skill categories and to manage a large in-house service organization during difficult financial times, which sometimes meant layoffs and other times meant college recruiting.

Murphy states that this management experience went better than the one at Airborne, “I had a chance to work with several other excellent managers as part of a self-directed management team. This concept, while somewhat difficult in the beginning, really provided a supportive, non-competitive atmosphere where we focused on the work and our employees collectively.”

Because of her supportive management, Murphy had the opportunity to work on several corporate projects, including one that investigated communication breakdowns throughout the company. As team leader, Murphy presented the project committee's findings to Tektronix' president and his staff; several of those recommendations are still being used today. Always energetic, Murphy also worked in a number of STC roles, including Society Employment Information Manager and Willamette Valley Chapter President.

Tektronix encourages its managers to rotate into different roles and in her last two years at Tektronix Murphy became an “in-house consultant” to the Manufacturing Operations staff. In this role, she used codesign and usability practices to design a human interface. She also participated on an Activity Based Management project, acted as the quality manager for the plant, and offered training on leadership, teamwork, writing, and human interface design. This consulting, with its variety and opportunities to learn and deepen her skills, led Murphy to take the plunge into business ownership.

Murphy thought that these first few months might be “quiet” but she is busier than ever. She is writing a book for new first-level managers that focuses on making it through that critical first year with sanity intact. She is very enthusiastic about her contract with Advocates for Women in Science, Engineering, and Mathematics (AWSEM). AWSEM helps connect middle- and high-school girls with professional women to keep girls interested in math and science. They are expanding their program nationally and Murphy is helping them reorganize their work to accommodate the new responsibilities. Murphy previously wrote and directed a video for AWSEM.

Between AWSEM and adapting her Leadership Seminar for Integrated Measurement Systems in Portland, Murphy says “That book keeps getting put on the back burner! I hope that my contacts through the Center will help move it to the front. I really enjoy meeting new people and look forward to my activities as an Associate.” To discuss how Tapestry Communications can help with your organization's management, work flow, writing, quality system, or training needs, just give Katherine a call or send her email.

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Benchmarking and the Value of Communication Among Managers

The primary and often overlooked benefit of participating in benchmark studies is in the sense of community it creates among benchmarking partners. Most organizations in our industry are open to all-encompassing memberships of information and training developers, editors, technical illustrators, managers and so on. Opportunities for groups of managers to convene to discuss issues that concern them all, compare their different approaches, and, together, arrive at a core of possible solutions, are all too rare.

Many large corporations see the value of this exchange, and they often bring their training, documentation, and customer service managers together for periodic meetings and seminars. However, while such meetings are very effective means to ensure that similar styles, approaches, and processes are being used across different groups within a corporation, they fail to inform managers about how competitors and others within the industry are confronting the same issues. Moreover, for the managers at single-site documentation groups—or simply at smaller companies—there are no opportunities to meet formally with peers.

By participating in benchmarking activities and attending summary conferences, managers create these new opportunities for sharing information; they extend their immediate circle of professional peers. Inasmuch as they have agreed to participate in the same benchmarking study, managers at the partner companies share similar concerns and are eager to learn more about the benchmark topic—most important, they are eager to learn from each other.

Julie Bradbury, Director of Operations for Information Transfer Operations at Cadence Design Systems, explains the value she found in benchmarking and partner communication:

I knew that by being a participant I could learn more about my own operation and gain insights from the efforts of others…The benchmark team members were accomplished professionals interested in the same issues and open to further discussions and sharing.

Jennifer Johnson, Publications Manager at Gerber Scientific Products, highlights some of the more specific benefits she gained from sharing information with her peers at a benchmarking conference:

The study and the partners’ conference satisfied all these needs and delivered unexpected value. One of the study partners presented a strategic plan for delivering user-centered documentation; we learned about new tools that are evolving to meet the needs of [our new] documentation strategy…we left the conference with a clear idea of the steps we need to take and how to take them, and a support network to help us with questions.

Similarly, Gil Mounsey, Manager of Information Products and Development at NCR Image and Item Processing, cites learning from other partners as one of several primary benefits from benchmarking:

The detailed reports, as well as the opportunity to meet with the other participants, have provided me with a baseline to proceed with the changes we intend to make.

We look forward to working with you on future benchmarking studies, helping you to identify best practices within the field, hearing about some of your own, and facilitating the invaluable communication described above.
Hynet Directive 2.0 Offers Component-Management Capabilities for Information Developers

Hynet Technologies announced on February 1, 1999, the latest edition of its electronic information management and distribution software, Directive 2.0. The software should attract the attention of publications organizations that hope to publish custom information on the web from a single source. Directive is already being used by Hewlett-Packard’s network operating system group and has just been adopted by Standard and Poor’s to convert financial articles from Microsoft Word to SGML for Internet viewing. The software allows us to transform static documents into reusable components and then publish them through the Internet, Intranets, and on CD-ROM.

Here’s what Hynet said about itself in a recent news release (August 1998): “The new functionality in Directive 2.0 will provide companies with a significant, almost immediate return on investment through reduced operational costs, increased productivity and efficiency, and improved customer service. Hynet’s strategic use of XML enables information from within multiple documents and word processing applications to be reused and republished, saving the time and resources associated with customizing information to meet end-user requirements or re-creating similar content throughout various departments of an organization. And the ability to publish customized, automatically updated versions to the Internet, intra/extranet, CD-ROM and paper from one source file saves costs and improves customer service by providing up-to-date information that is tailored to meet end-user needs. Directive intends in the 3.0 release later in 1999 to [allow end users] to create their own individual knowledge libraries with no more than a web browser—a significant step toward improving corporate-wide knowledge sharing.”

Features
Hynet Directive 2.0 includes a number of features that should prove useful to information-development managers:

♦ authoring environment. With version 2.0 of Directive, your staff can author in Adobe FrameMaker and Microsoft Word; in version 2.5, they will add Quark. No changes in the authoring environment are required (no SGML coding) but the more structured the document, the more reusable the individual components.

♦ granularity. Directive lets you designate the level of granularity you want in your project, from chapter, section, heading level, and paragraph, table, or graphic. Directive builds a tree structure that reflects your choice of granularity.

♦ output environment. Directive takes your original documents and translates them in XML and stores them in a database (Oracle or other standards databases). Then you can output the documents as HTML, XML, SGML, and Hynet’s own Digital books (enhanced HTML) in version 2.0. In version 2.5, PDF and postscript outputs will also be possible.

♦ version-tracking. Hynet provides version tracking at the information unit level, not just the source file level as most document management systems (DMS) do.

Benefits For Publication Managers
At present, Hynet Directive is most powerful at allowing you to build an XML database of components of your documents and then publish derivative documents that mix and match paragraphs, graphics, tables, or sections and chapters of the original documents into new documents. For example, you may have a reference manual made up of all the commands available in your operating system. Using Directive, you can take the original Frame or
Word document or multiple documents and create a tree structure in XML. Then, you can publish derivative reference manuals that have only the sections that apply to a particular customer, platform, release, and so on. Or, you could have a complete user’s guide that contains background information, overviews, and procedures. You can then create an HTML version that contains only procedures for more experienced users.

To create the highly targeted derivative documents from your original, you simply drag and drop sections of the original to create new documents. Directive automatically maintains all the original links and creates new tables of contents and indexes for each derivative document. When you drag and drop a high-level section, all its child topics come with it. If you don’t want to use all the child topics, you can delete them from the derivative document.

The plan for the 3.0 version at the end of 1999 is to provide end-users with a drag and drop capability through their web browser. They will be able to create their own custom versions of documents from your documentation library. You will be able to provide an entire library of documents, divided into chapters, sections, or paragraphs. Your end-users will be able to create their own custom set from across multiple document sources.

Directive provides a very flexible conversion process. Two transformations are involved:

First, Directive takes your standards format (MS Word, Adobe FrameMaker, and, soon, Quark) and transforms it into generic XML. It identifies heading levels, paragraph types (lists and bullets), tables, and graphics from the styles in the source files.

Then, Directive transforms generic XML into derivative formats (i.e., customized XML, HTML, and Hynet’s digital books and digital libraries—enhanced HTML). How this transformation looks depends on your custom mappings. You decide on the way you want particular tags to look in the output formats. Each output format can be different.

The conversion capabilities embedded in the Hynet Directive software are also part of a module that is available as a stand-alone command line program (from which batch-like functions can be run). This stand-alone conversion module can, for example, convert MS Word documents into SGML and can convert SGML into highly enriched HTML, generic XML, or customized XML.

Hynet Directive can also generate XSL. Because Web browsers do not yet support XSL, this capability has not yet been taken advantage of. (MS Internet Explorer supposedly will support XSL in future versions. Also, once Microsoft Office is fully compatible with XSL, end users will be able to easily create, for example, derivative PowerPoint slides from a superset of slides.)

**Competitors**

Chrystal, from Xerox, is the main direct competitor of Directive. Chrystal stores components rather than whole documents.

Document management systems (DMS) such as Documentum, PC Docs, Filenet, are not direct competitors. In fact, they are more complementary with Directive than competitive. Hynet is working to establish partnerships with DMS developers. DMS applications store information at the file level—BLOB (Binary Large Objects). Hynet Directive stores information at the component level.

Electronic publishing tools like Inso or Lotus’s Enigma are somewhat one dimensional. They can only convert, for example, from source to SGML or from Lotus Notes to the Web.

Lower-end capability tools like InfoAccess convert from source to HTML but are not customizable.

Web delivery is royalty free with Hynet Directive (unlike with other tools). Additionally, Hynet offers a unique pricing option that allows unlimited titles and end-user access and CD-ROM distribution. In addition to English, Directive supports four major Asian languages. (Hynet’s major funding comes from Acer Corporation.) They are discussing relationships with translation memory software developers.

For more information on Hynet Directive 2.0, contact

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C A M P U S  R E C R U I T I N G

Michigan Technological University

We will be profiling university information-development and training programs in each issue. If you’ve had a good track record with graduates from a particular program, send an email to editor@infomanagementcenter.com.

With more than 100 undergraduate and 75 graduate students enrolled as majors, Michigan Technological University’s (MTU) Scientific and Technical Communication (STC) and Rhetoric and Technical Communication (RTC) programs are among the most acclaimed in North America. MTU offers degrees at all education levels, from BA or BS to MS and PhD. MTU also boasts one of the largest student chapters of the Society for Technical Communication in the world. The undergraduate degree was established in 1982—prior to that, students enrolled in STC certificate programs. In sum, more than 450 students have graduated from the various programs.

MTU’s Department of Humanities consists of approximately 40 faculty, about a dozen of whom regularly contribute to the STC program. The 12 STC faculty members teach 21 courses plus a number of special topics in the STC area. Students develop skills in technical writing, editing, technical sales consulting, system design, management, and multimedia design. Undergraduates must complete over fifty quarter hours in the communication core (written, oral, electronic, and video) which includes the STC core and coursework in written and visual communication as well as philosophies of literature and history of technology. In addition to the university’s general education requirements and the communication requirement, STC students must complete as many as 13 courses in an area of technical concentration.

Professor Craig Waddell, director of the undergraduate STC program, comments:

One of the many strengths of MTU’s undergraduate program in scientific and technical communication is the strong technical backgrounds of our students; our BS degree requires students to take approximately 20% of their degree credits in a technical concentration such as electrical engineering, biology, or computer science. The technical and theoretical rigor bodes well for graduating students. The average entry-level salary for the grads is $34,000/year, and 100% are employed in the industry upon graduation. Graduates have traveled across the country to work for companies as diverse as IBM, Unisys, Ford, Whirlpool, Rollerblade, The Discovery Channel, and Dreamworks Studio. Co-op work experience is strongly encouraged and students often leave the classroom for as many as six months to work onsite in companies across the country.

The master’s degree program prepares students for advanced careers in technical communication, consulting, training, and instruction. Students participate in research projects, as well as practice technical communication, while working on academic journals. Finally, the PhD program prepares students for careers in academe by teaching the tools of research design and the application of theoretical knowledge about information readability and processing.

The STC program maintains a comprehensive website of the programs described above at www.hu.mtu.edu/hu_dept/STC_pages/index.html. Within the website potential employers will find a “jobs” link where they can advertise job openings. A “student work” link allows visitors to see sample projects created by the students. Other links will take visitors to course descriptions, alumni survey results, and links to other technical communication websites.

For more information on the STC and RTC programs, recruiting programs, or co-op work offers, contact:

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Best Practices • February 1999
BOOK REVIEW
Crossing the Chasm

Geoffrey A. Moore

Review by JoAnn Hackos

I began recommending that information-development managers read Crossing the Chasm by Geoff Moore when it first came out in 1991. Even though some of his examples are dated in 1999, the book remains an invaluable addition to a manager’s library. Moore provides insights into high-tech marketing strategies that can assist all of us in better understanding our information and training customers and in developing our own strategies for information transfer. Moore also helps us recognize the struggle our marketing colleagues are going through to position high-tech products effectively. The better we understand why they think the way they do and what they are trying to accomplish, the better we will be able to contribute to the success of the products we support and develop.

Moore, formerly a partner with the marketing consulting firm, Regis McKenna Inc., and now head of his own organization, The Chasm Group, has been a “must read” for the past nine years among marketing and other senior managers of the companies we work for. His role has been to demonstrate the importance of recognizing the flaws in the traditional approach to marketing high-tech products.

Most companies expect, Moore explains, to move smoothly through what is known as the Technology Adoption Life Cycle. This Life Cycle envisions the high-tech market as a bell curve (Figure 1).

In this model, new technologies are introduced to anxious Innovators and Early Adopters. After they are on board, companies attempt to use their recommendations to make the transition to the more hesitant, pragmatic, and conservative members of the Early and Late Majorities. The customers in these groups represent the greatest potential sales for our products because they encompass the largest customer base. It is among these majority groups that the greatest revenues and profits are to be realized, especially as the technologies mature and the effort expanded on the initial development efforts begins to pay off.

Unfortunately, as Moore demonstrates, it is never that easy. Many technology startups fail to get past the Early Adopters. He labels the transition from visionaries among the Early Adopters to the pragmatists of the Early Majority, “crossing the chasm.” Too often, companies with great products and exciting new technologies descend into this chasm, never to re-emerge. The limited market among Early Adopters is quickly exhausted, making new revenue scarce at the same time that the companies are expending considerable resources to improve the product, add functionality, and increase sales efforts to attract the Early Majority.

Figure 1: Technology Adoption Life Cycle
To overcome the resistance of the Early Majority to new technology, Moore recommends that companies find a special niche in the market and pursue it singlemindedly. To succeed, the company needs to present these potential customers with value that meets their special needs. To meet special needs, Moore advocates the development of a “whole product” message. We can use Moore’s perspective in *Crossing the Chasm* to look at the potential information needs of customers. In fact, with this understanding we may even be able to contribute to the difficult job of crossing the chasm.

Innovators are the classic techies who will try a new technology just because it is there. They have great, almost unanswerable, demands for information about the new technology. They do not need task-oriented information because they are likely to try to use the technology in new and innovative ways and they are more than likely to learn through experimentation rather than through following standard procedures. They have enough experience with new technologies that they can often intuit how to make the technology work for them with only the interface and some notes from the developers.

It is important to note that Innovators are more like developers than they are like mainstream customers, which is why developers are so comfortable with them. Because developers understand how Innovators are motivated, they know a great deal about the kinds of information that will be both useful and exciting. As Moore explains, the technology enthusiasts will “forgive ghastly documentation, horrendously slow performance, ludicrous omissions in functionality ... all in the name of moving technology forward.”

Early Adopters are less technically focused than the Innovators but they are patient with new technologies, willing to spend considerable effort understanding how to apply them to the complex business challenges. These visionaries need good information to support their goals but they are willing to spend time in learning, even if the information is not complete. Both the Innovators and the Early Adopters are willing to give your technology the benefit of the doubt; they want you to succeed.

Not so the mainstream markets. The Early Majority are pragmatists; they want good service, and they want good information and training. Members of the Late Majority, who represent one-third of the potential market, are even more skeptical. They are believers in keeping things the way they have always been, not innovating. They find themselves trapped into using new technologies. They resent products that are difficult to use, and they hate it when they can’t find the answers in the documentation. They especially don’t want to call customer service because they consider most of the people on the other end of the line to be arrogant and ignorant about their needs. Members of the Late Majority want, even demand, all the job aids, wizards, and performance support aids that they can get to make their jobs easier.

Geoffrey Moore is not first to introduce the concept of the Whole Product. He is able to use the Whole Product concept to reinforce his argument about the importance of adopting a new perspective on the product in order to cross the chasm. Moore points out that there is often a gap between the promise that marketing has made to the customer and what the actual product is able to do. If this gap is to be closed, the generic product must be enhanced by services and other products “to become the whole product.” The whole product, Moore illustrates, must include effective documentation, training, and support. The services included with the whole product must enable the pragmatist and conservative customers to gain full value from the product by putting it to use completely in their organizations and realizing productivity and quality gains.

Information-development managers are all too familiar with the problems of getting their companies to understand the need for the whole product. Developers prefer listening to the innovators and early adopters, making functionality ever more complex and ignoring usability. Documentation and training often, under these conditions, emphasize what developers believe to be most important. Marketing is often paying close attention to the early adopters, who have lots of visionary ideas about what the product ought to be. They are not especially interested in building the whole product.

What marketing should do, according to Moore, is focus on the chasm and the problem of convincing the Early Majority that the product is safe, effective, and usable. At this point, a strategy-minded information manager should be participating in the dialog, even
leading it. Information, training, and support hold the keys to success. If the information manager is not aware of the potential, it is highly likely that the documentation, training, and support will continue to be focused incorrectly on the early market. There will also be enormous pressure to reduce costs, especially by cutting documentation, because usually the product is not generating sufficient revenues to satisfy the venture capitalists or the stock market analysts.

Information-development managers must, however, be careful not to fall into their own information chasm. Communication and training professionals become quite adept at following the lead of the product developers and creating documentation that explains how the product works. However, the pragmatists and conservatives of the new mainstream market care at lot less about how the product works and much more about how they can gain by using it in their workplace. To meet the information needs of the mainstream market, information-development managers must insist upon going to work for the customer. That means visiting the customers’ workplace, learning about their productivity issues, understanding their goals, and learning how they make use of information and training. From this information base, information-development managers can focus their teams on building value in information, training, and support.

IN PRINT
A SELECTION OF ABSTRACTS FROM THE FIELD

Is Your Online Help Helping Your Customers?

PC World magazine’s recent survey of more than 6,800 PC users (November 1998) reveals that only six out of ten are very satisfied with the overall reliability of and service on their PCs. In the reliability survey, 70% reported having at least one problem with their computer, while 30% reported three or more problems (these numbers increased when considering home, instead of work, computers.) However, nine out of ten PC owners report that they would buy the same brand again.

Regarding service, fewer than six out of ten were very satisfied with the level of service they received. Delays in service were the primary complaint. Secondary complaints included the lack of knowledgeable customer service representatives and the lack of sincere effort in dealing with customer problems.

Of most concern, of the 23% who sought answers online, most frequently by email, only 22% responded that the online help solved their problem. About 13% never even got a response.

Electronics Industries Fall Below Average In Severance Packages

A recent survey conducted by Lee Hecht Harrison, an outplacement firm based in Wood-cliffe, NJ, found that severance packages are more generous than three years ago (New York Times, November 29, 1998, section 3, page 6). However, computer software and hardware manufacturers were among the “stingiest” in the national survey.

The chief officer at Lee Hecht Harrison explains that the tight job market demands that employers fight to retain current employees more than ever, and by providing services to departing employees, the remaining employees will begin to view the company as an employer of choice because it treats even departing employees well. Among the findings:

♦ more companies are extending benefits after severance
♦ temporary employees are eligible for severance pay at 7% of the companies
♦ 20% help temporary employees find jobs elsewhere
♦ 30% of companies offer job placement services
♦ top-level employees receive 11–39 weeks’ severance pay, while others receive 5–27 weeks’ pay.
Visualizing Problems...and Solutions!

The November 1998 issue of *Technical Communication*, 45(4), focuses on the concept of visualizing information. In “Visualization Strategies for Team-Oriented Problem Solving, Analysis, and Project Planning,” Paul Lewis outlines a method for visualizing material throughout a group discussion. By presenting information in both a visual and relationship-based format, this system facilitates a project-planning session in order to successfully and efficiently complete problem analysis and arrive at a solution.

Lewis’ model focuses on the problems analysis and objectives analysis phases of the development process. During the problem analysis phase, individuals write problem ideas on cards. The group facilitator then clusters the cards according to theme on a pin board. Next, the group determines specific cause and effect relationships between the clusters and organizes a problem tree based on these relationships. In the objective analysis phase, the group converts the problem tree into an objective tree by changing each problem to a future desirable condition, thereby creating a set of means-ends relationships. Ultimately, the group uses information determined from the problem and objective trees to select a set of means-end chains that will best address the problem.

This type of project planning session allows large quantities of information to be collected and processed efficiently in a group situation. Since all information is visible throughout the discussion, ideas and relationships are presented in a clear, easy-to-organize manner. The system eliminates inefficient cyclical discussion, results in a clear means-end solution, and improves the overall efficiency of the problem-solving, project-planning process.

Cost-Effective Computer-Based Training

Too often organizations decide to try to “get by” with informal, on-the-job training to save money. However, Judy Lamont explains in *KMWorld* (January 1999) that in the long run, that decision can cost money—employees take too long to reach productive levels and they may make errors that are expensive to correct.

According to the American Society for Training and Development, training employees accounts for more than $50 billion in direct and indirect expenses. Per employee expenses vary widely, averaging over $1000/year for high-tech to under $200/year for customer service. This expense has prompted companies to look for alternative forms of training. Computer-based training has gained popularity over the years because of its flexibility, reduced learning time, and improved retention of knowledge (61% over printed materials and 42% over seminars and workshops). Although the use of electronic training techniques has doubled in the last year, it currently accounts only for 20% of instructional time.

The Web is an enticing medium for delivery of CBT and is optimal in many situations; for example, when no video or audio content is involved, when frequent updating is required, or when large, geographically dispersed groups must be trained.

Development costs for a CBT can cause sticker shock, with programming rates and media rates upward of $100/hour. In the long run, expenditures will be lower, but facing the upfront costs can be sobering. To efficiently develop a computer-based training program, Lamont offers these strategies:

♦ Select only the portion of your existing training that can be effectively presented electronically.
♦ Use templates whenever possible to reduce design and programming time and costs.
♦ Modularize so that different components can be upgraded independently.
♦ Train your content expert to use a development tool to produce a training product.

Facing Y2K

In “Y2K: So Many Bugs...So Little Time,” (*Scientific American*, January 1999) Peter de Jager points out that Y2K problems have been occurring for many years. For example, a centenarian was invited to attend kindergarten in Minnesota. The Amway Corporation rejected a batch of chemicals because it mistakenly believed that an expiration date of 00 meant 1900, not 2000.
It might seem an easy task to change all two-digit dates to four digits. But it is difficult to find these instances in computer code, and even when they are found, it may be difficult to make the expansion. Over the years, companies have lost parts of the source code for some computer programs making them impossible to update; programmers never expected that their software would last long enough for this to be a problem, but software has proven to be much longer lived than hardware.

It is possible to solve the Y2K problem without changing all dates to four digits. For example it is possible to divide all the years between 00 and 99 around a pivot. Years 00 through 44 can be considered 2000 through 2044. Years 45 through 99 can be considered 1945 through 1999. However, it only works for the years between 1945 and 2044. The pivot approach seems to solve the Y2K problem until the year 2044.

When doing computations with two-digit dates, it is possible to get negative numbers when an earlier date is subtracted from a later date. For example, someone born in 1985 will be 30 years old in 2015 but in two-digit arithmetic his age would be 15 – 85 = –70. A way to solve this problem is to add a positive number to both dates before the computation. If we add 28 to both numbers in two-digit arithmetic before doing the calculation we get 43 (15 + 28) and 13 (85 + 28). Then the age becomes 43 – 13 = 30—the correct result.

What is the bottom line for the Y2K crisis? De Jager believes that in the best case about five percent of infrastructures in power, transportation, and telephone systems will fail in some way—but not necessarily at midnight on the first day of the year 2000 and not necessarily catastrophically. De Jager believes that there will be some severe disruptions at the beginning of the year 2000 that will last about a month. Other less serious problems are likely to occur throughout the year.

Under Construction
www.world-ready.com/biblio.htm

Nancy Hoft, a doctoral student in Rhetoric and Technical Communication at Michigan Tech, is compiling a bibliographic list of sources in technical communication. At press time, citations were available under the following topics:

- Writing, Publications Management, and User Interface Design
- Graphics, Icons, and Symbols
- Cross-Cultural Communication

The site will expand soon to include:

- International Business and Marketing
- Titles Specific to the Software Industry

The site also contains links to additional bibliographies on international technical communication that are available on the Web as well as a book search to order online.


www.humanfactors.com

Human Factors International, Inc. trains and consults with developers to enable them to “create user interfaces which are more intuitive and self-evident to the user.”

At their Web site, you can subscribe to the company’s free email newsletter. Every month they review important developments in user interface research from major conferences and publications. Topics covered in the newsletter include development, HCI issues, I/O devices, multimedia, documentation, and training. The Web site also contains

- articles on usability, interface design, and Web site effectiveness
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- request a Web site usability evaluation (which is free if your company qualifies)

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The Project Management Workshop
April 12–13, Washington, DC. Led by JoAnn Hackos, PhD. Sponsored by Influent. You will leave this information-packed workshop with a comprehensive understanding of the development life cycle of a project and a proven model to use as a guide to successfully manage your own projects. www.influent.com, 888-333-9088

Same session to be held: May 26–27, Chicago; June 10–11, San Francisco

Publications Management Clinic
April 12–16, Santa Clara, CA. Led by Paula Berger, Saul Carliner, JoAnn Hackos, Jay Talbot, Steve Wexler, and others. Sponsored by Solutions for Documentation and Training Needs. The Publications Management Clinic focuses specifically on the issues that technical publications managers deal with every day. Filled with exercises and case studies targeted to your needs, the seminars offer practical approaches for effectively managing projects, staff, and departments. The Publications Management Clinic combines the focused, in-depth information you expect from a seminar, the broad range of information you expect from a conference, and the individual attention you expect from a consulting session—with the high quality you've come to expect from SOLUTIONS. www.sol-sems.com, 800-448-4230

Info Online '99
April 20–22, Orlando, FL. Sponsored by Influent and Help University. Three-and-a-half days of seminars that educate and train, keynote speeches that challenge and entertain, more than 60 sessions in all to provide you with the greatest conference experience available. Designed for anyone on your team responsible for getting your organization's information online. www.io-conference.com, 888-333-9088

Eighth International World Wide Web Conference (W3C)
May 11–14, Toronto, Canada. Sponsored by International World Wide Web Conference Committee and Foretec Seminars (from the STC web site). This conference will bring together leaders from academia, research organizations, government, and industry, offering delegates a chance to gain a global perspective of the issues facing the Web community. www8.org

CHI '99: The CHI is the Limit
May 15–20, Pittsburgh, PA. Sponsored by ACM. The annual CHI conference is the leading international forum for the exchange of ideas and information about human-computer interaction (HCI). Diverse members of the global HCI community meet at the CHI conference to share the excitement of discovery and invention, to make and strengthen professional relationships and friendships, and to tackle real-world problems. Come to CHI, and be part of laying the foundations of our discipline and identifying the challenges yet to be solved. www.acm.org/sigchi/chi99/call/overview.html

46th Annual STC Conference: River of Communication
May 16–19, Cincinnati, OH. Sponsored by STC. The conference theme, “River of Communication,” ties together our conference location and growth and the progress of our profession. We'll focus on technical communication—its traditions, current state of the art, and glimpses into our future. As the last STC annual conference in the 1900s, this is the time to reflect on the flow of this River of Communication—to reflect on our past as a foundation for our future. www.stc-va.org

ASTD International Conference and Exposition 99
May 22–27, Atlanta, GA. Sponsored by ASTD. Choose from over 250 sessions according to your experience and interest. Hear case studies from high-profile, multinational companies. Make valuable contacts among your peers from over 80 countries. See the latest training products at the industry's largest EXPO, featuring The Discovery Playground in the Technology Pavilion and the Experiential Learning Pavilion, where interactive exhibits and scheduled demonstrations will help you learn about your profession's newest tools. www.astd.org, 800-NAT-ASTD
Learning Technology Online 99
March 7–10, Boston, MA. Sponsored by Inside Technology Training. Addresses the full range of online learning delivery methods through a uniquely focused educational program and an exhibition of products and services. www.learningtechnology.com, 888-950-4302

1999 Conference on Knowledge Management and Organizational Learning: Making it Real and Deriving Value
March 8–9, San Francisco, CA. Sponsored by IBM Global Services. Designed for executives involved in leading, managing, and supporting knowledge management initiatives and projects. The conference will focus on three core elements of knowledge management: organization/culture, management/process, and technology. www.conference-board.org, 212-759-0900

Same session to be held: April 19–22, Chicago; May 4–7, Atlanta; June 7–10, San Francisco

How to Plan, Develop, and Evaluate Training seminar
March 8–11, Washington, DC. Taught by Ruth Clark, PhD, sponsored by Influent Technology Group. Whether you are a trainer or a technical professional with training responsibilities, the strategies you learn here will help you maximize your effectiveness and the return on your organization’s training dollars. Focusing on the fundamental skills you need to plan, organize, and produce your training courses, you will learn techniques for pre-engineering your training development to ensure that it meets your company’s needs. www.influent.com, 888-333-9088

Same session to be held: April 15–16, New York City

How to Design and Develop Computer-Based and Multimedia Training seminar
March 15–18, Washington, DC. Taught by Ruth Clark, PhD, sponsored by Influent Technology Group. Research shows that the instructional methods you use—determine learning effectiveness. The techniques you will learn here will ensure that your CBT will produce the training results you want in the most effective and efficient way possible. You will return to your workplace with specific approaches to design and development that you can apply at once to your project. www.influent.com, 888-333-9088

Same session to be held: April 19–22, Chicago; May 4–7, Atlanta; June 7–10, San Francisco

1999 ISPI Conference and Exposition: One World, One Mission: Improving Human Performance
March 23–26, Long Beach, CA. Sponsored by ISPI and IFTDO. This unique partnership builds on ISPI’s 37 years and IFTDO’s 28th year of providing timely and innovative educational events for the Human Resource, Performance Improvement, and Training and Development professions. At a time when organizations are under pressure to maintain a competitive edge by increasing efficiency, reducing costs, and improving performance, your ability to address these workplace challenges will determine your success and the success of your organization. www.ispi.org/services/conf99/, 202-408-7969

Effective User and Task Analysis for Interface Design
March 29–31, Boston, MA. Taught by JoAnn Hackos, PhD. Sponsored by Influent. Learn how to identify, define, and document users’ interface requirements. Discover strategies for translating requirements into usable interface designs. Design and develop interfaces that enhance user adoption. www.influent.com, 888-333-9088

Same session to be held: May 5–7, Chicago.

WBT Producer Conference and Expo 99
April 6–8, San Diego, CA. Sponsored by Influent. Topics covered include: Executive and strategic management, WBT business strategies and tactics, project management, instructional design, tools and technologies.

The Manager’s Calendar is Continued on Page 15