Developing a Playbook Strategy for Efficient Collaboration

Creating a framework that enables writers to collaborate efficiently on writing tasks is not easy. We see this struggle occur every day across groups in our own organizations at HP and EMC. Our informal discussions with CIDM members reveal that many of you also face challenges trying to improve collaboration within and across writing teams. Even though writers are accustomed to collaborating at the document level—with each writer owning one or more project deliverable—teams encounter more difficulty when managing more granular content in a content management system (CMS). Indeed, dividing up work at the topic level comes with ample challenges that can prompt comments of frustration: “I was more productive developing information before we had a CMS.”

When writers manage content at the component level, they can lose a sense of ownership, certainty, and control over the writing process. Their overall sense of competence can become undermined, along with their willingness to collaborate.

In this article, we explore how to create more structure to solve this problem. Cultivating collaborative writing efficiency depends on a clear delineation of how the team will work together during key phases in a project. The process of scripting a set of tasks ensures that each member on the team knows exactly how to coordinate with the others. We refer to these scripts as “plays,” drawing on the analogy from team sports or dramatic performances.

In the most important factor to consider when developing your own list of roles and responsibilities is that specialization of the roles is central to managing structured content development. Given that playscripts had value fifty years ago when fewer roles were involved in information development teams, we have even more reason to invest in the playbook strategy today to ensure that team members optimize their interactions across the information development life cycle.

What is a Play?

Just as a play on the field or a script for the stage guides explicit actions, a play for writing creates clarity around the roles being performed and the sequence of steps needed to complete tasks. The play unambiguously defines who does what and when around a set of tasks and subtasks, such as a play called “Developing New Content” for a certain product. The play, as we envision it, consists of four components discussed in turn: roles, phases and tasks, types of collaboration, and structure of the play.

Roles

Roles tell us who the players are, what each player should do, and when to do what. In Table 1 on page 2, we define a set of roles that our writing teams use at HP and EMC.

The most important factor to consider when developing your own list of roles and responsibilities is that specialization of the roles is central to managing structured content development. Given that playscripts had value fifty years ago when fewer roles were involved in information development teams, we have even more reason to invest in the playbook strategy today to ensure that team members optimize their interactions across the information development life cycle.

In addition to Brockmann, others have advocated the need for scripted processes, especially because workforces have become increasingly globalized. For example, Robert Barnett promoted the use of the playscript to document administrative procedures, publishing three editions of the text in 1993, 2003, and 2008. In 2005, Paul Benjamin Lowry and his research team examined what factors can improve the productivity of writers collaborating virtually. Lowry’s findings indicate that, by following scripted processes, writing teams can bypass the confusion that may occur when trying to determine who will carry out certain tasks at a given phase of the writing process. This structure enabled the writers that he studied to collaborate more efficiently because the scripts removed the assumptions about ownership and the guesswork about responsibilities that often derail collaborative work practices.
PHASES AND TASKS
In Table 2 on page 3, we have condensed the five-phase Information Development Life Cycle outlined by JoAnn Hackos. Each phase represents major segments of work, and the bulleted lists break down the work in each phase into manageable chunks or tasks. Although the phases and tasks can vary from one organization to another, the key is defining the phases that are relevant in your organization so that all team members understand what activities occur in a given sequence during the development life cycle.

Once you have mapped out the information development life cycle specific to your organization, determine what tasks to document in each phase so that team members have the information they need to coordinate their work efficiently.

Do not be tempted to think that just because you have project plans or standard operating procedures related to these tasks that your teams have what they need to collaborate effectively. The aim of the project plan is to capture the requirements, milestones, deliverables, and dates; the focus of the standards and procedures guide is to describe how each team member independently should perform tasks. Neither of these artifacts describes how a writing team should work collaboratively to carry out a complex series of tasks.

Table 1: Sample Role Definition for Information Management Teams

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project lead</td>
<td>Assesses scope of work to plan allocation of resources. Oversees project planning and management, including team formation, agreements, and measures of success.</td>
</tr>
<tr>
<td>Project tracking administrator</td>
<td>Oversees project and deliverable progress. Maintains status updates for review internally and with engineering.</td>
</tr>
<tr>
<td>Release administrator</td>
<td>Creates the CD index; submits files to manufacturing and web administrators; and tracks any issues raised.</td>
</tr>
<tr>
<td>Information architect</td>
<td>Provides a technical understanding of how to manage and publish content, including combining, linking, and/or reusing content to form consistent information products. Oversees the classification, organization, and assembly of content to ensure the creation of a complete set of information for the project.</td>
</tr>
<tr>
<td>Build or publishing architect</td>
<td>Oversees all technical aspects of publishing digital information products on the web, for integration into user interfaces, online help files, and/or for CD production.</td>
</tr>
<tr>
<td>Tools specialist</td>
<td>Oversees tool-related issues, including managing and troubleshooting XML editors, style sheets, and DTDs. This role also loads and extracts files to and from the CMS.</td>
</tr>
<tr>
<td>Content developer</td>
<td>Creates, revises, and assembles topics and other building blocks for publications.</td>
</tr>
<tr>
<td>Update specialist</td>
<td>Updates existing topics.</td>
</tr>
<tr>
<td>Content assembler</td>
<td>Validates topic assembly, cross references, and content quality.</td>
</tr>
<tr>
<td>Editor</td>
<td>Oversees compliance with standards, style guide, and requirements for content reuse.</td>
</tr>
<tr>
<td>Subject matter expert</td>
<td>An individual with domain expertise related to the content being developed who approves or authorizes the accuracy of the content.</td>
</tr>
</tbody>
</table>

Types of Collaboration
Collaboration can occur in different ways. For the purposes of the playbook, we focus on three possible types of collaboration: serial, parallel, and collective:

- **Serial collaboration**: occurs when writers work on an information product one after another. Each person works separately on a piece of the writing or the whole document, each performing a distinct function in the creation of the finished work, and possibly in a distinct chronological or hierarchical order.

- **Parallel collaboration**: occurs when writers work on different content pieces for the same project simultaneously. Each person works on one piece of the whole, usually based on a set of negotiated standards or requirements, and engages in coordinated communication with other collaborators as required from time to time. In parallel collaboration, writers may find themselves interacting with others on the team because of their common goals.

- **Collective collaboration**: occurs when writers contribute concurrently to a project through topic assignments based on a writer's knowledge of the product (specialty areas), tracking of the project, and delineation of specific predefined roles. Coordination at designated intervals is critical. All members provide equally important contributions to the project and have shared ownership of the overall project success.

---


When the different types of collaboration are clearly defined, the team can understand more fully how the responsibilities within each role relate to tasks throughout the life cycle of development.

**Structure of the Play**

The play consists of three main sections depicted in Figure 1: the purpose, resources, and tasks.

The **Purpose** section defines the reason for the play—the goals to be accomplished and why they are important. This section must include the entrance and exit criteria so that the definitive outcome is clear to the whole team. The **Resources** section identifies four components pertaining to the play logistics and any issues or risks that could impact the timetable:

- The roles or skills required
- The length of time the play should take
- Any non-labor resources required
- Any contingencies or risks

The **Tasks** section is the most critical because it describes how the shared work will be carried out. It maps out the types of collaboration required for each facet of the play in enough detail so that all members of the team understand the interaction of roles sufficiently so that no one duplicates or omits critical steps.

The play is considered successful when it fulfills the exit criteria. In some cases it makes sense to illustrate the workflow of a play, a practice that can help teams find missed or confusing steps.

**Plays at Work**

We have two sample plays to illustrate how we have integrated the playbook strategy in our own organizations. Figure 2 on page 4 illustrates the first example, which is a play for planning the development of video content at HP. Figure 3 on page 4 as well depicts the second example, which pertains to the development of requirements for information architecture at EMC and includes a process diagram. Note how each organization developed the play differently.

We continue to use the playbook strategy at HP to identify precisely who the players are and how they will interact. For example, a team recently formed to create a video catalog of HP services adopted the strategy to set up a process quickly. Prior to the use of play, each team relied on a cumbersome standards document to describe governance and rules. But the use of this standards document rarely described how team members should interact throughout an activity to achieve a particular outcome. The use of plays, like the one for planning videos, enables team members rapidly to define the work in question and determine the level of effort, who should participate, and how to coordinate their actions. The playbook strategy—especially in light of our global workforce at HP—removes the guesswork, error, and inefficiency from the information-development process.

At EMC, we used the playbook process to develop a play that describes how to submit business requirements for projects designed to enhance our centralized DITA Content Management System. Before instituting the play for this process, teams would submit requests for enhancement in many different ways and often requests would go unaddressed due to lack of clarity around which roles performed which tasks and what entrance criteria were necessary to successfully submit a request. The play assisted us in communicating the process, steps, and roles involved in successfully submitting new requirements. It was especially helpful because the process is used across a wide range of business units and geographies and the playbook provided them with clear information about how to complete the process.

**Creating a Collaborative Playbook**

When teams need to collaborate, the intent is to increase efficiency through collaboration. Yet, teams frequently will see their productivity decrease unless they invest in a strategic
approach to collaboration. The Collaborative Playbook strategy is an essential tool that teams need to work together more effectively. But creating the collection of plays that make up a collaborative playbook is not an easy assignment. The time needed to invest in a comprehensive playbook is more than one organization can accomplish alone. Accordingly, the CIDM team and members are here to help, but we need your support.

As discussed at CIDM Best Practices Conference 2013, Comtech is building a Playbook repository for CIDM members to collaborate on plays. Our vision is for CIDM members to access the repository to search for plays to download, offer suggestions to improve plays, and adapt plays to a specific organization. The Playbook site currently already has eight plays drafted—to view them, please visit <http://knight.comtech-serv.com:8081/playbooks/>. We see the playbook repository as a faster way of creating a common set of plays for collaborating that many members can use.

If you are interested in learning more about the Collaborative Playbook Strategy, please contact Charlotte Robidoux or in participating on the CIDM Collaborative Playbook strategy, contact JoAnn Hackos.