BEST practices

A Publication of
The Center for Information-Development Management

JUNE 2011
VOLUME 13, ISSUE 3

Building a Collaborative Writing Strategy

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Doing business in a global marketplace demands virtual collaboration. Sharing topics in a content management system requires writers to collaborate virtually. What does collaboration mean in technical writing organizations? To answer this question, we surveyed models of collaboration, especially one developed by Morten Hansen in Collaboration: How Leaders Avoid the Traps, Create Unity, and Reap Big Results. *In this article, we examine how Hansen's methodology can support the process of building and implementing a collaborative writing strategy, one that supports successful single sourcing solutions. We explore the benefits of collaboration, why barriers occur, and how to overcome those barriers. We also provide useful tools and strategies to help teams reach their collaborative potential.*

Why is Collaboration Important?

In his book, *Collaboration: How Leaders Avoid the Traps, Create Unity, and Reap Big Results*, Morten Hansen appeals to the business world precisely because the benefits of collaboration are measurable in the following areas:

- Innovation
- Creative problem solving
- Operational efficiency
- Agility
- Sales and supportability
- Customer satisfaction

Hansen provides compelling examples that point to the benefits of integrating people across different business areas and technologies to create or leverage innovations from existing ideas. He refers specifically to measurable results at Procter & Gamble, Wells Fargo, and Apple (Hansen, pp. 33-35). For instance, Proctor & Gamble leveraged 13 products to market 24 brands using collaboration strategies; each brand generated at least 1 billion in annual sales. This example highlights the measurable value of collaboration in business settings.

> *"Collaboration is about people working together to achieve goals. But what does working together really mean?"*

In an intensively competitive global marketplace, organizations must respond to customer needs. Increasingly, customers access product information—including product descriptions, documentation, and reviews—anywhere, anytime, and on any device. As the demand for information increases, writing teams are challenged to deliver quality content quickly through ever-expanding distribution channels. Delivering on-demand content requires automation to ensure consistency and translation efficiency. Single sourcing solutions allow organizations to produce the topic-based, modular information that customers seek. But for organizations to do this work successfully, individuals must learn how to work together to develop and deliver content.

What is Collaboration?

Collaboration is about people working together to achieve goals. But what does working together really mean? What does it take to make this happen?

(continued on page 61)

CONTENTS

Best Practices Newsletter

A publication of The Center for Information-Development Management.
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From the Director

JoAnn Hackos

Using the Net Promoter Score to Evaluate Customer Content

If you have not yet heard of the Net Promoter Score (NPS), it's likely that you will—and soon. NPS is quickly becoming a key corporate indicator of customer satisfaction.

NPS was first promoted by Frederick F. Reichheld in his 2003 article in the *Harvard Business Review*. He defined the NPS this way:

> "Companies spend lots of time and money on complex tools to assess customer satisfaction. But they're measuring the wrong thing. The best predictor of top-line growth can usually be captured in a single survey question: Would you recommend this company to a friend? This finding is based on two years of research in which a variety of survey questions were tested by linking the responses with actual customer behavior—purchasing patterns and referrals—and ultimately with company growth. Surprisingly, the most effective question wasn't about customer satisfaction or even loyalty per se. In most of the industries studied, the percentage of customers enthusiastic enough about a company to refer it to a friend or colleague directly correlated with growth rates among competitors. Willingness to talk up a company or product to friends, family, and colleagues is one of the best indicators of loyalty because of the customer's sacrifice in making the recommendation. When customers act as references, they do more than indicate they've received good economic value from a company; they put their own reputations on the line. The findings point to a new, simpler approach to customer research, one directly linked to a company's results."

Gathering data and calculating your NPS is really quite simple. You ask customers if they would recommend your product or company to a friend or colleague. Then, you give them a 10-point scale, from 0 for "not at all likely" to 10 for "extremely likely."

You divide your results into three categories and count the number of responses in each category:

- Promoters are those who score you 9 or 10. They are very enthusiastic and ready to recommend your product widely.
- Passives are those who score you 7 or 8. They're OK with your product but could easily be drawn away by the competition.
- Detractors are those who are very unhappy with your product and likely to send negative messages. They score 6 or lower.

To calculate your NPS, calculate the percentage of customers who are promoters and subtract the percentage who are detractors. For example, if 70% of your customers think your product is useless and only 10% would strongly promote it, you have an NPS of 10%-70% of -60.

For more information, see <http://www.netpromoter.com/np/calculate.jsp>

With an NPS of -60, you're not likely to be in business much longer unless you

significantly change your business model. You want to turn the detractors into promoters, not just by making them less unhappy but also by actually turning them into active advocates.

To turn around the negative attitudes of existing customers, you will need to embrace several key business objectives:

- Create an atmosphere in the company that focuses on customer quality
- Set out a roadmap for the changes that you know must occur for you to be successful
- Gather data that you can trust about what your customers demand from product and service quality
- Get to the real causes of customer unhappiness by conducting a root cause analysis
- Take action for correcting the problems uncovered and ensure that people are accountable for the problem solutions
- Embrace innovation and embark on a program that transforms your company into one that understands and cares about your customers

What I find most interesting about the NPS is that it has most to do with the quality of the product when it is actually being used. It's not about a list of features or how many new releases you had in one year. It's not even about sales. It's about the service you provide to customers after they have purchased your product.

I know of at least one company that recognized the importance of its customer content after getting a really low NPS. In addition to the base question about customer loyalty, they asked how much product usability and content quality influenced the customer's position. Both scored low. Part of the result was a move to improve content quality significantly. That meant changing the relationship between the technical authors and the product developers, as well as establishing closer relationships with customer support and redefining the type of content that would be delivered to customers in the future.

This organization has big goals and a challenging transformation ahead, but the executives now recognize that content quality has a dramatic affect on customer loyalty, as does the usability of the product. The key to the success of the transformation is direct support from the top executives and the enlistment of everyone else in the company.

How do we know, you might ask, if customer content is critical to loyalty and to the company's success? Michael Hammer, who wrote *Reengineering the Corporation* in 1993, also wrote a seminal article on the importance of post-sales support.

For Hammer, post-sales support includes the product information that the customer needs to be successful in learning and using the product. Unfortunately, as we well know, management often considers post-sales support, especially customer content, to be a "necessary evil."

Here is how Hammer describes it:

> "First and foremost, post-sales support activities have long been seen in organizations as cost centers, annoyances, and post-climatic distractions from the real business of designing and selling new products."

He believes that few executives understand post-sales support because they haven't grown up in that world. In most cases, the support that customers need is dispersed among multiple organizations including technical information, training, and service. He argues that because it is generally poorly done and badly supported, post-sales support provides an opportunity for a company to differentiate itself and beat the competition.

Because NPS focuses on users and not on buyers, it provides a measure of customer satisfaction with the support they get from all

CIDM

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angles after they have purchased a product. In my experience with consumer products at home, especially my new HD Camcorder from Sony, I want to know

- Is the UI easy to understand or filled with obscure symbols and acronyms?
- Is any of this explained in the user manual?
- Is there information in the manual or on the Internet that helps me learn how to be a successful user?
- Will I continue to be frustrated because I have goals that I want to achieve (better videos) but I cannot figure out how to achieve them?

If Sony were to send me an NPS survey, I would be a detractor because I'm disappointed with the post-sales support.

The action for you to take—find out if your company is using the NPS. In fact, find out if your competitors are using the NPS. Then, ask how you can follow-up with detractors. Charles Schwab Corporation, for example, calls customers to better understand their concerns. Learn what customers need as they learn how to be successful. And, finally, promote what you learn to improve the way content is presented and used.

JoAnn

(continued from page 57)

Of the different definitions of collaboration that we reviewed, we found that Hansen's definition best gets at what collaboration really is and why it is so difficult to do well. For 15 years, Hansen conducted research on collaboration in a wide range of companies, including Hewlett-Packard, searching for answers to the question, "What is the difference between good and bad collaboration?" His research led him to define collaboration as a discipline: "The leadership practice of properly assessing when to collaborate (and when not to) and instilling in people both the willingness and the ability to collaborate when required" (Hansen, p. 15).

Three concepts are central to Hansen's definition of disciplined collaboration: leadership, motivation, and ability. Cultivating a culture of collaboration requires leaders—from the executive level down to the department manager level—to lead the collaboration effort. And that means motivating people to want to collaborate and equipping them with the ability to do so.

> ***"... the strategy must also include plans for how writers will be enabled to successfully achieve business goals ..."***

- Motivation is about instilling in people feelings of being valued and necessary, connected, set up for success, and part of a larger purpose.
- Ability is about enabling collaboration through the right resources and tools, communication channels, process structures, and training.

Leading the collaborative effort does not mean simply telling people that they must collaborate or creating a mission statement that says that the organization values collaboration. These all-too-common practices do not motivate people, and they certainly do not provide people the support they need to collaborate successfully.

To cultivate a culture of collaboration, leaders need to model the kind of collaborative culture that they envision by establishing a management framework that not only values and rewards collaboration but also offers training, tools, and processes in support of this kind of interactive work. For example, if a leader wants writers to develop shared content, then she needs to set specific performance targets that can be measured to determine the level of collaboration carried out by the team.

What Makes Collaboration Difficult?

Collaboration is essential to achieving results in today's business climate. But collaboration is not easy and runs counter to management practices. Collaboration is not something leaders can just ask or expect people to do. It is a disciplined practice that requires know-how. Most people have never been taught how to collaborate successfully. In higher education, for example, the emphasis is on individual performance—on proving one's individual knowledge and capabilities; as a result, most graduates enter the workforce not understanding what it means to collaborate, why they should collaborate, or how to collaborate. This experience then creates a culture that is not prepared for collaboration, which is the reason why cultivating a culture of collaboration is so critical; it's an adaptation that leaders in education and in business need to lead.

In their book, *Virtual Collaborative Writing in the Workplace: Computer-Mediated Communication Technologies and Processes*, Beth Hewett and Charlotte Robidoux attribute many of the collaboration challenges in single sourcing environments to this general lack of know-how:

> To the extent that individuals typically are more accustomed to producing whole texts rather than smaller pieces of content, many writers do not understand how to contribute efficiently to jointly developed written materials. Furthermore, many

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> geographically distributed writing teams lack guidance and experience on how to coordinate complex activities across space and time. (p. xxiii)

A collaborative writing strategy must go beyond plans for *what* writers, or others contributing to the development of information, are expected to do; the strategy must also include plans for *how* writers will be enabled to successfully achieve business goals (see Overcoming Collaboration Barriers, pg. 66). Understanding what the *how* component should entail, though, means understanding organizational obstacles to collaboration—obstacles that must be overcome if writers are to be motivated to want to collaborate and equipped with the ability to do so. Primary organizational obstacles include modern management, silos, and competition; an information transfer approach to communication; and cultural factors.

Modern Management, Silos, and Competition

As Hansen's research indicates, modern management often discourages rather than encourages collaboration insofar as performance management practices in the workplace reward individualism. That is, business environments openly thrive on competition at various levels in the organization, from business area silos and functional units to individual employees. Performance objectives often guide individuals to work at cross purposes. Even when working on a team, each contributor often has a separate set of targets that induce competition.

For technical writers, the individual focus is hard to avoid since the practice of writing is normally a solitary activity. But when writing practices are automated, writers must transcend the inclination to work alone and own whole documents. Yet if the management framework in which they work does not endorse a collaborative culture, writers will have little reason to change their writing behavior. Thus to establish a collaborative culture, leaders must re-examine and redesign their performance management practices.

> ***"... when writing practices are automated, writers must transcend the inclination to work alone and own whole documents."***

Information Transfer Approach to Communication

In addition to modern management, silos, and competition, an information transfer approach to communication in organizations accounts for why business areas are often self-reliant and why groups tend to hoard information, have difficulties finding information, and have weak connections with others in the organization (see Collaboration Barriers, pg. 64).

An information transfer approach to communication focuses on the one-way transmission of a message from sender to receiver, often through various communication channels, and assumes that the meaning transmitted is the meaning received—that the message means the same for the sender as it does for the receiver. This approach presupposes that if a message is well written and transmitted with reasonable accuracy from sender to receiver that the receiver will be able to apply that information successfully to her problem-solving activities (see Figure 1).

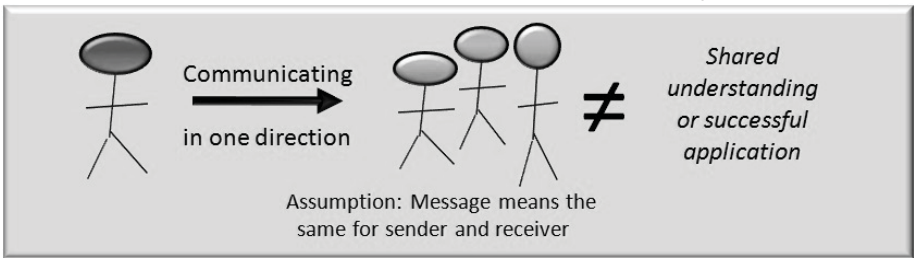

FIGURE 1: INFORMATION TRANSFER APPROACH TO COMMUNICATION

The information transfer approach to communication has faced much scrutiny from communication and social science experts (see, for example, Brown & Duguid, 2000; Doheny-Farina, 1992; and Rogers, 2003), as it fails to account for how individuals come to understand what the transmitted information might mean in terms of the social context in which it is to be used. Stephen Doheny-Farina argues that an information transfer approach to communication "separates knowledge from communication" and assumes that communication means "sending information through channels" and sending facts to receivers—when receivers successfully possess the facts, communication is successful" (Dohney-Farina, p. 8). The problem with this view, however, is that it "does not explain how information comes to mean something to a participant in communication activities, nor does it tell why people have difficulty communicating with one another" (Dohney-Farina, p. 9).

In single sourcing environments, people representing different business areas must work together to achieve common content goals. These goals are difficult if not impossible to achieve, however, in organizations that primarily depend on an information transfer approach to communication.

Studies show that communication channels that facilitate synchronous, interactive communication, such as video conferencing and face-to-face meetings, are inherently more effective than asynchronous, one-way communication channels, such as email and webinars, in helping individuals of different groups and expertise come to shared understandings of meaning. Synchronous, interactive communication channels allow for "a negotiation and sharing of perspectives, values, language, knowledge, and so forth" as opposed to exchanges of objectified pieces of information through technological channels (Doheny-Farina, p. 10).

Organizations developing a collaborative writing strategy need to implement synchronous, interactive communication channels that support innovation, provide shared access to information, and facilitate interaction, knowledge acquisition, and learning. These channels, thoughtfully implemented, can increase people's motivation to collaborate and their ability to do so successfully.

Cultural Factors

Implementing communication channels that facilitate interaction, knowledge acquisition, and learning are not going to automatically result in successful collaboration, just like developing a shared vision alone is not going to automatically result in a collaborative culture. Leaders also have to be mindful of cultural factors that may hinder successful collaboration (see Figure 2).

Technical documentation, engineering, training, marketing—these groups represent some of the common cultures that must work together in a content management system (CMS). Each culture shares a language, history, value system, structure, and set of rules, practices, and artifacts unique to that culture. These cultural factors define each culture and influence how members of each culture interpret new information.

When a technical documentation team is adopting a new CMS, for example, team members' individual and collective interpretation of the new system will be influenced by the language, rules, habits of practice, and tools with which the members are already familiar.

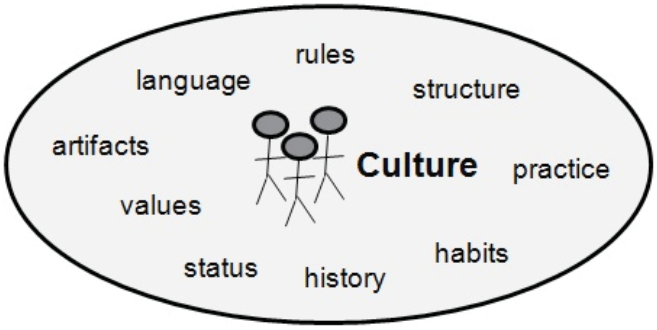

FIGURE 2: CULTURAL FACTORS THAT MAY HINDER SUCCESSFUL COLLABORATION

Members who are resistant to collaborating in the system may be resistant not because they lack motivation to collaborate but because the system is a far departure from long-ingrained habits of practice. Learning new habits of practice takes time and requires the right resources and tools, communication channels, process structures, and training.

Just as cultural factors can hinder successful collaboration within a team, so too can they hinder successful collaboration between teams. When two widely differing cultures, such as a technical documentation team and an engineering team, attempt to collaborate, cultural factors tend to be the biggest barriers to successful collaboration. Because the two cultures in effect speak a different language; share different values, practices, and roles; and draw on different problem-solving strategies, the two cultures often struggle to come to shared understandings of meaning. Without a common ground on which the two cultures can understand each other—that is, without a shared vocabulary and opportunities to come to shared understandings of meaning through highly interactive negotiations—the two cultures will struggle to collaborate successfully.

Collaboration Barriers

Organizations accustomed to competition, independence, and information transfer approaches to communication are likely to encounter multiple collaboration barriers. According to Hansen, the first two barriers, *hoarding* and *innovation*, pertain to motivation. And the second two, *search* and *knowledge transfer*, involve ability.

Hoarding

This barrier results because individuals have little incentive to share their time, data, or resources. Performance goals often encourage hoarders to operate this way. The characteristics of hoarding in writers include a reluctance to give up control and a reliance on one's own way of doing things. These characteristics are symptoms of the following:

- **Competition and perfectionism**. Places emphasis on owning books and controlling words.
- **Being too busy**. Invites someone to just do it "my way," especially in the face of meeting release deadlines.
- **Fear of losing power**. Centers around control or ownership of a book.

"Organizations accustomed to competition, independence, and information transfer approaches to communication are likely to encounter multiple collaboration barriers."

Because writers follow a natural tendency inherent in the writing process—to work alone—leaders need to implement management strategies that encourage writers to share ideas, coordinate activities, and coauthor topics. When people do not know what others are up to or thinking, they tend to fear the worst and hoard information as a kind of self-preservation behavior.

Innovation

Business areas that have been siloed for a long time often lack incentive to innovate with other groups (Hansen calls this barrier the "not-invented-here" barrier). Business areas tend to believe that ideas developed within the group are the best whereas ideas developed outside the group are suspect. Such an insular culture, according to Hansen, can lead to a "We're better than they are" and "Need to fix our own problems" attitude, as well as a fear of exposing weaknesses. This attitude and fear prevents groups from wanting to collaborate with other groups within the organization. Innovation is also discouraged when groups rely on information transfer approaches to communication, as one-way communication

means that people are not participating in the kinds of interactions and negotiations necessary to innovate.

Consider, for example, the case of an HVAC manufacturing company at which Rebekka worked as a technical editor. The technical documentation group felt like a scapegoat in the organization, as they were frequently blamed for late releases and for slowing up projects. When the documentation group received the go ahead to move to single sourcing with a CMS, the group was afraid that the engineers, who received frequent recognition for their achievements, would not support the initiative if the benefits were not immediately evident to them.

Because the documentation group was new to single sourcing with a CMS and had a lot to learn, the group decided to go at single sourcing and evaluating a CMS on their own, first, before getting buy-in from engineering or product management. The group did not want other departments to discredit its proposal before it had a chance to prove that it was a good idea. This belief that ideas developed within the group were best deterred the group from innovating with other groups in the organization. Because the group was afraid of exposing its weaknesses, it resisted inviting other groups to help problem solve.

> ***"The terms* information *and* knowledge *are often used interchangeably. But these terms represent different levels of understanding, expertise, experience, and know-how."***

Search

The search barrier, in many ways, is a symptom of the information age. Even so, as the number of communication channels grow so does the amount of information. Businesses that make use of myriad communication channels invite employees to sort through overwhelming amounts of data. The need to find the right information to write documentation can result in hours and even days lost hunting down the right details.

The need to find information suggests a lack of sharing information or working together. Search problems that affect writers are related to the following:

- Knowing where to begin looking for content.
- Refraining from spontaneous conversations about where to locate information.
- Lacking the right connections and established processes for working collaboratively.

A struggle to find the right information might point to an underlying problem with information transfer or one-way communication. How information is delivered makes a difference to individuals who may lack a predetermined interpretation of products or services being developed. Distributing more information in various forms is not the answer. Rather, leaders must seek more opportunities for interactivity (consider a team that relies on email communication versus an interactive wiki that includes essential information, resources, and contact information).

Knowledge Transfer

The terms *information* and *knowledge* are often used interchangeably. But these terms represent different levels of understanding, expertise, experience, and know-how. Information is a message that contains meaning; information helps people understand more "about" something. Knowledge is the ability to judiciously apply that "about" understanding in practice. In their well-known book, *Working Knowledge: How Organizations Manage What They Know*, Davenport and Prusak define knowledge as "a fluid mix of framed experience, values, contextual information, and expert insight that provides a framework for evaluating and incorporating new experiences and information" (Davenport and Prusak, p. 5).

Because a person develops knowledge about a practice, technology, or other entity over a long period of time, that knowledge cannot be easily transferred.

Knowledge transfer, like information transfer, is a major barrier to collaboration. This barrier results when people from different business areas need to work together but do not know how to do so; they lack critical how-to knowledge. According to Hansen, "This transfer problem is not about motivations but about abilities: people can be highly motivated to work together, but they find it difficult to do so" (Hansen, p. 60). Knowledge transfer problems can occur for the following reasons:

- **Tacit knowledge is hard to convey**. Some people know a lot about how things work, why they work the way that they do, and who to talk to about what. These people have gained tacit knowledge about the organization over many years. Transferring this knowledge is difficult to do without sufficient support and resources.
- **No common framework for working together**. People do not share common visions, values, processes, or tools. They don't, according to Hansen, have "an understanding of each other's working habits, subtle ways of articulating something, a liking of each other, and an appreciation for each other's moods" (Hansen, p. 62). They thus struggle to work together.
- **Weak rapport for knowledge transfer**. When people in an organization don't know each other, they find it difficult to transfer knowledge. They have not developed a learned sense of how to communicate with each other, how to phrase questions and comments, or how to interpret each other's nonverbal, verbal, or written signals. Strong, interpersonal relationships are necessary for knowledge transfer.
- **No process structure to enable know-how**. People might be motivated to share knowledge, but if they don't know how to do so or if they lack the right tools with which to do so, knowledge transfer is not likely to occur. People need to be enabled to share knowledge (see Implementing Enablers for a list of knowledge transfer enablers, p. 68).

Overcoming Collaboration Barriers

A cultural change is required when organizations transition from individually-owned documents stored on PCs to shared content modules stored in a shared repository. This change requires leaders to recognize that different barriers to collaboration require different solutions, or what Hansen calls "levers." These solutions include implementing a unifying vision, T-shaped management, a network of alliances, and collaboration enablers.

Unifying Vision

An organization chooses to create vision statements for a number of reasons, one of which entails making the entity more focused and thus successful. Indeed, some studies indicate that companies with a clear vision are more effective. That said, many employees share the experience that a stated vision does little to motivate them. How to make a vision compelling, while not an easy task, is an important one, especially if organizations seek improved collaboration. Hansen describes the motivational power of a well-crafted vision, namely, JFK's challenge to send a man to the moon and bring him back safely (Hansen, p. 79).

A powerful vision, like an effective tag line, can permeate attitudes and shape behaviors; "going green" is a simple example of how words and phrases can mobilize collective behavior. Understanding the reason why a course of action is important can make it easier to recall the words that embody a vision. The quest for a collaborative culture thus begins with a leader committed to establishing a framework that engages the organization and motivates individuals to collaborate. This unifying purpose functions as a kind of connective tissue that spurs collaboration inside an organization, outside and across other organizations, and even with customers. The process of creating a vision always begins with a compelling set of questions:

- Why is your organization's work valuable?

- What qualities would describe future success in your organization?
- How can collaboration enable this success?
- What results are difficult to achieve without collaboration?
- What words and phrases encapsulate your future success?
- What words create an image of what you're trying to achieve?
- What words and phrases are lasting and inspiring?
- Can the organization see the future success as attainable?

A unifying vision is central to any organization that seeks advancement—that sees the possibility of transforming itself in the future. A vision is essential for any organization committed to the results that collaboration makes possible. Because writing organizations need collaboration to create shared content, managers will enable transformation by establishing a vision that serves as a basis for guiding the team.

Practicing T-Shaped Management

Hansen refers to the second lever of motivation as "T-shaped management." The driving force behind this management framework is the emphasis placed both on individual accountability and on collaborative performance. Four work styles define his model:

A T-shaped management structure enables leaders to combine the performance objectives with goals for collaborating. Establishing this framework requires the following components:

- Build a top-down strategy and strong leadership engagement and support
- Create performance plans (individual & collaborative)
- Reward T-shaped behaviors for existing staff and when hiring
- Set goals for collaborating
- Provide leadership coaching
- Conduct 360° reviews
- Measure and track progress

In practice, a T-shaped performer could be measured on the number and quality of co-authored topics delivered on time for a product release rather than on owning, updating, and delivering a document. Additionally, measures can be defined around how effectively a writer supports specific roles that benefit the whole organization.

Valuing information developers who are accountable both for their individual and their shared contributions is central to creating a collaborative culture. That is, describing the importance of collaboration without implementing a performance management structure to drive interactive work behaviors will do little to change the culture. Instead, leaders who want collaboration to characterize their business areas need to offset both the individualism that typifies the modern management culture and the tendency to see writing strictly as a solitary activity.

Building a Network of Alliances

This lever is about establishing diverse, strategic, and extensive top-down and bottom-up connections across the organization. When people are well-connected—when individuals have established relationships with other individuals within their unit and across business areas—they are more motivated and better enabled to collaborate.

This lever speaks specifically to the search and knowledge transfer barriers. Finding information and people who have the right knowledge is harder in bigger companies. Where do you look? Who do you ask? What kind of response can you expect? Well-connected people better enable knowledge transfer—tacit knowledge is hard to convey or codify. When people don't know each other, they're less likely to ask for the information they need and more likely to complete a task on their own with whatever information they can find on their own. This does not lead to innovation and results.

In cultivating a culture of collaboration, leaders need to develop a structure for connecting people. This structure might include

regular social events, social media, informal intra- and inter-unit meetings, who's who maps or diagrams, an interactive knowledge base, or inter-unit focus groups (also referred to as communities of practice).

Implementing Enablers

This lever relates to equipping people with the tools and know-how necessary for successful collaboration. We refer to this grouping as the "enablers" lever, which seemed absent from much research that we reviewed on collaboration and collaborative writing. Enablers, however, are critical to cultivating a culture of collaboration.

Enablers not only facilitate knowledge acquisition and learning, but also guide teams in problem solving. In addition, they help structure team member interactions. Enablers, such as process scripts and interactive web conference software, keep everyone focused on the task at hand, and they help team members know who is doing what, when, how, where, and why (Lowry, Nunamaker, Curtis, & Lowry, 2005). Figure 3 shows different types of enablers:

- **Training**. New processes, methodologies, and tools should be supported with hands-on, interactive, guided, and tailored training.
- **Tools**. These should facilitate interactive communication and knowledge transfer—some tool enablers include knowledge bases, interactive communication channels, instant messaging, web conference software, and content management systems.
- **Guides**. Team members need direction—guides such as process scripts, vision statements, meeting agendas, style guides, and who's who maps or diagrams help equip team members for successful collaboration.
- **Meetings**. Successful collaboration requires team members to meet often—highly interactive, structured meetings that are goal driven and that facilitate consensus building help teams achieve goals more efficiently and effectively.

A particularly effective enabler for teams is a knowledge base—a centralized, open access repository of all of the resources teams need for effective collaboration. A knowledge base can facilitate interaction and encourage discussion. It might include process scripts, who's who maps and personal introductions, and frequently asked questions. It might also include status updates, best practices, tips, and ideas. The knowledge base serves as a knowledge management tool, facilitates learning and knowledge acquisition, and codifies tacit knowledge.

In cultivating a culture of collaboration, leaders need to implement enablers that equip team members with the know-how necessary to achieve business goals in collaborative environments.

Assessing Your Culture and Areas to Improve

Attempting to make collaboration improvements without assessing the elements needing improvement can be counterproductive. If your

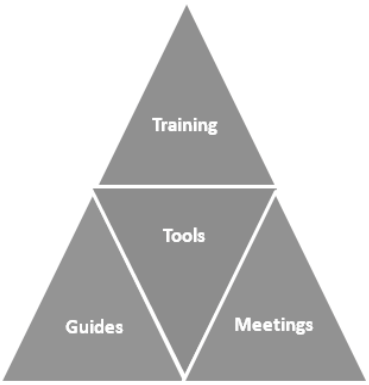

Figure 3: Enablers Lever: Equipping People with Know-How through Training, Tools, Guides, and Meetings

team is having difficulty learning to collaborate, consider some self-assessment tools to help you understand the impediments. For example, if motivation is an issue, the corrective measures will be different from those used to address ability-based problems as defined by Hansen.

As T-shaped management principles suggest, writing teams need to be proficient at knowing when to collaborate and when to work independently. Just as a sports team's performance depends on individual skill combined with coordinated interactions, writing teams need to acquire a comparable kind of proficiency. But doing so must begin with the assessment process. Table 1 describes some of the tools available to help writing teams evaluate their ability to collaborate effectively.

Determining what assessment protocol to use depends on your organization and the level of detail or dimensions you want to capture through the inventory. The value of a self-assessment is that it provides leaders with constructive baseline information that they can use to create collaborative transformations.

The assessment of a team at Hewlett-Packard exemplifies how the assessment process can help leaders focus on meaningful improvements. With the help of students at U.C. Berkeley under the direction of Hansen, HP administered Hansen's survey in an organization consisting of business analysts, product consultants, information developers, and instructional designers. The results of the study indicated that while there were some motivational obstacles to address, the major issues at hand concerned the collaborative ability of the organization as whole. Specifically, the team struggled most with search problems followed by difficulty conveying complex ideas and transferring knowledge from one subgroup to another.

The results of the study helped the HP team develop a strategy focused on collaboration enablers: improving team member relationships, building online networks, reorganizing and classifying information, and implementing more effective processes, tools, and technologies that support effective collaboration. The HP team also discovered, through analyzing the survey results, that team members needed help determining when collaboration would be most effective. Team members needed protocols for when to work independently, when to work interactively, and how to coordinate handing off tasks to one another.

Mapping Your Plan

Assessing existing collaboration practices is the first step of mapping a plan for successful collaboration. The Cisco Collaboration

Assessment tool	Description
Omni Institute profile of collaboration <http://www.omni.org//instruments.aspx>	Measures collaboration effectiveness in terms of: ♦ Context ♦ Structure ♦ Team members ♦ Results of interactive performance
Collaboration: What Makes It Work Wilder Collaboration Factors Inventory <http://wilderresearch.org/tools/cfi/index.php>	Measures collaboration factors: ♦ Environment ♦ Membership ♦ Process and structure ♦ Communication ♦ Purpose ♦ Resources
Morten Hansen's survey <http://www.thecollaborationbook.com/2.php>	Measures barriers: ♦ Hoarding ♦ Not invented here ♦ Search problems ♦ Transferring information

Table 1: Tools for Evaluating Collaboration

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Framework recommends a three-stage process for creating a culture of collaboration. In addition to assessing existing practices, what Cisco terms the investigation stage, Cisco proposes two additional stages:

- Performance. Efforts shift from an organic and opportunistic approach to collaboration to a more structured and prescriptive approach to collaboration.
- Transformative. Collaboration is used to reinvent the organization.

Creating a literal map of what your organization can do in each of these stages helps team members see the overall collaboration plan and the progress. Figure 4 offers an example of a collaboration road map.

In addition to creating a collaboration road map, we recommend an action plan that includes the following components:

- Action Steps: *What will be done?*
- Leadership: *Who will lead?*
- Timeline: *By when?*
- Resources: *Those available? Those needed?*
- Other Roadblocks: *Who might resist? How?*
- Communications: *Stakeholders? Modes? Frequency?*

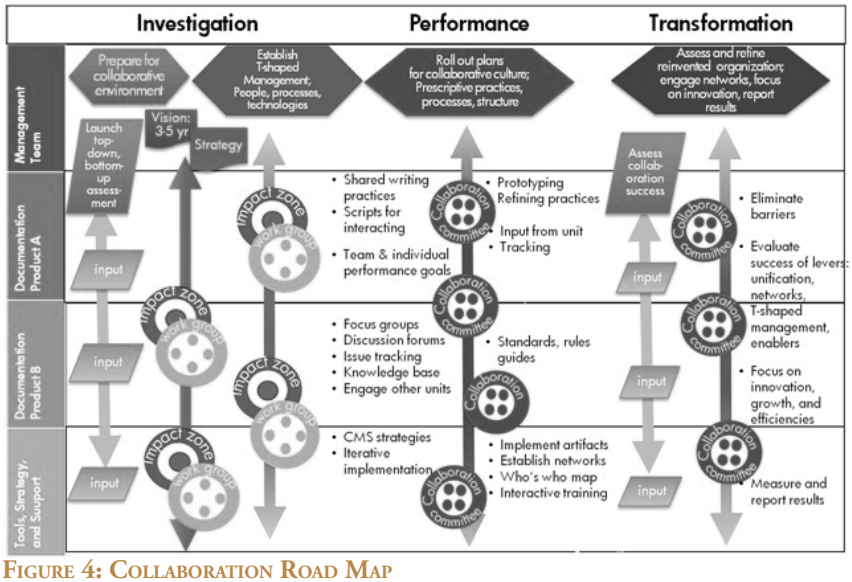

Figure 4: Collaboration Road Map

Understanding Collaborative Writing

Some would argue that assigning more than one individual to similar work products can be inefficient. Productivity can be compromised if assignments are not clear, structured, or coordinated. However, when leaders implement disciplined collaboration, the benefits can be substantial, even in a field like writing, that seems less suitable to group effort.

Not only do researchers indicate that repeatable, structured processes can promote productivity (Lowry, Nunamaker, Curtis, & Lowry, 2005), but also practitioners report efficiency gains among writing teams collaborating in content repositories. While the effort involved in cultivating collaborative writing efficiency is extensive, the effort involved is not a reason to avoid collaborating. Teams increasingly are pursuing content management system solutions precisely because they want to do more with less—to produce high quality content more efficiently with fewer resources. Disciplined collaboration can make this kind of transformation possible.

Connecting Writers with Readers

Charles Cantrell, ExactTarget

ExactTarget writes a software application used by some of the world's largest and most sophisticated corporations to manage their email marketing campaigns. Our customers' intention is to engage their customers in a meaningful conversation that will inspire loyalty to their products and services. ExactTarget also has many customers who are smaller but no less motivated to communicate in a meaningful way with their customers. Our experience has shown that the companies who listen and respond appropriately are the ones that do best in the marketplace. Taking this to heart, our Documentation Department actively develops practices that allow us to listen and respond to our documentation customers.

It is a tenet of good technical writing that writers should know their audience. But sometimes it is harder for a writer in the trenches to learn about the audience than anyone would like. In some cases, companies don't want writers to take time away from "productive" writing. In other cases, other factors get between the writer and the reader. Lack of proximity, lack of access, and in some cases, not knowing who the reader is can all get in the way of responding.

But, with changes in technology, it is possible to connect writers and readers in conversations that are productive, convenient, efficient, and cost effective. Our Documentation Department recently implemented a process that gives us the ability to listen and respond directly to our customers' (our readers') concerns, questions, and documentation issues.

The ExactTarget application is a large, technically challenging piece of software that can be used in many ways, for many types of marketing campaigns, using many web technologies. There are application features that manage subscriber lists and communication content, not only for email, but also SMS and social communication.

In addition to an extensive user interface, our application also has a rich API that can be accessed through SOAP, XML, and a RESTful interface. These interfaces merge and coordinate many web technologies including HTML, XML, JavaScript, Ajax, Twitter, Facebook, and others. This complexity is not always easy for our clients, who are generally from a marketing background rather than a technical one, to navigate. Given this environment, it can be a real challenge to write documentation that is technically accurate in such a way that our readers can implement their marketing concepts in our application space.

> ***"It is a tenet of good technical writing that writers should know their audience."***

ExactTarget, like many companies, provides documentation online. And, like most companies, we have provided mechanisms for readers to provide feedback. Originally, this mechanism was a "contact us" page on the web site with our address, phone number, and an email address that went to a distribution list. While we occasionally received feedback, it was not well used and was of relatively low value for helping us know how we could better serve our readers.

We recognized that the better we do the job of helping our customers serve themselves, the more economical our support process will be, the more our customers will be satisfied, and the more profitable we will be. In an effort to better understand what our readers need and how we can serve them, we began attaching a generic "feedback" form to each page of our

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Charles Cantrell started his programming career helping develop control code for industrial laser robots. During that time, he was tasked with writing the safety, operations, and service procedures for those systems. Finding that he enjoyed the documentation process, he spent several years in documentation and started documentation departments for two different companies. Now at ExactTarget, he works as an Automation Engineer where he automates documentation processes using C#, PHP, SQL, XML, and various web technologies. Charles has been a Senior Member of STC, and served as President of the Hoosier Chapter.

documentation that sent the comments to a distribution list of writers. Since our publication process is automated, the feedback form was relatively easy to put into place.

While the generic form still sent email to a distribution list, it did provide a reminder on each topic page to our readers that they could contact us if they had an issue with our documentation. With the form in place throughout the web site, we saw an increase in responses. Some of these responses helped us identify improvements that we could make in our documentation.

Still, the documentation manager was looking for a way to really ratchet up the communication between our writers and our readers. She realized the form did not give any particular indication to the reader that there was a human being on the other end of the form who could and would really respond.

In our department, each topic is "owned" by a particular writer, and this ownership is identified in the documentation production system. Ownership of a topic gives a writer both the opportunity and the motivation to understand subtle nuances of application features, as well as the authority to address the documentation as they see fit.

Since ownership is known, we knew that the publication system could attach a web form to each page specific to each owner. After some relatively simple coding changes in the publication process, this web form now specifically identifies the writer of the topic and routes the email directly to the owner of the document (as well as to backup coverage). Since the email is routed directly to writers who understand the topics, they are generally able to easily point the reader in the right direction or to clarify their misunderstanding.

> *"The intention is to let each reader know that a real person is on the other end ..."*

The form design now makes it clear that feedback is going to a particular person. We changed the "Submit" button to say, for example, on Adam's document (Figure 1) to "Send Adam Feedback", as well as adding other language specifying the writer. The intention is to let each reader know that a real person is on the other end of the documentation who knows the topic, who can help clarify parts that are not clear, and even improve the documentation, if necessary.

From these contacts, our writers can provide links to places in the documentation the reader may have overlooked or that may have been difficult to find. Readers often seem shocked when they get a direct response to their

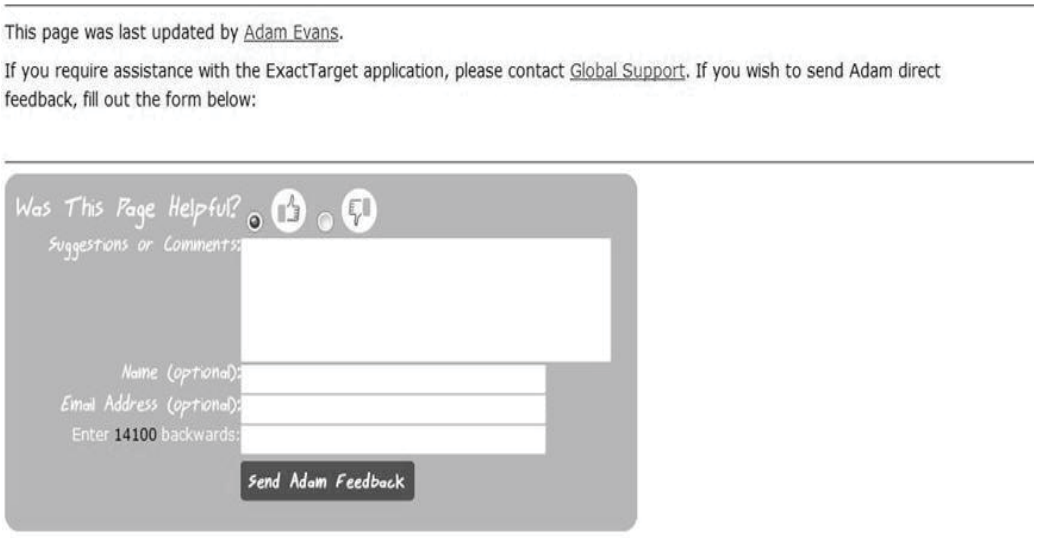
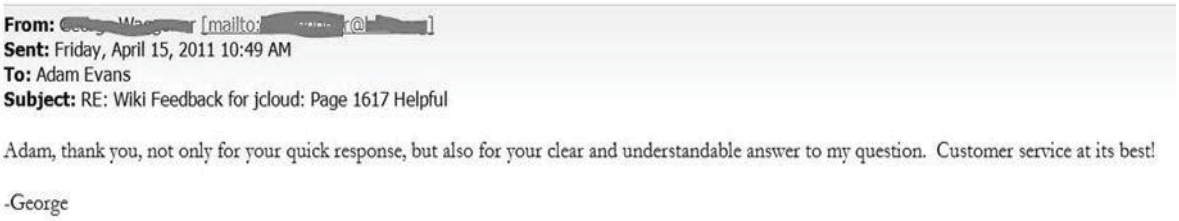


Figure 1: An Example of Our Feedback Form


From: [redacted] [mailto:[redacted]]
Sent: Friday, April 15, 2011 10:49 AM
To: Adam Evans
Subject: RE: Wiki Feedback for jcloud: Page 1617 Helpful

Adam, thank you, not only for your quick response, but also for your clear and understandable answer to my question. Customer service at its best!

-George

Figure 2: One Response

question or issue. Even when they start out frustrated and upset, we are generally able to get them the information they need to be successful. Every once in a while, we even get feedback as shown in Figure 2.

Feedback also gives our writers ideas about where and how content should be reorganized or reworded to clarify a process, procedure, or concept. While some feedback messages are veiled (or even explicit) support requests, it is an easy matter to forward these to the support team and get the customer into the appropriate support channel.

> ***"You might ask why we aren't writing more clearly already, ..."***

The remaining messages have resulted in a better understanding for our writers on areas that need additional information or areas where different topics need to be connected. This feedback results in better documentation and better experiences for our readers and provides a real awareness to our writers of how they are helping our customers.

As an example, in a recent week, we received three requests for clarification on how to implement the "double opt-in" feature of our application ("double opt-in" requires subscribers to take two actions to confirm their wish to receive marketing communications). These requests made it clear to the writer responsible for that area of the application that the topic lacked enough information. Since adding additional information and linking it to the appropriate areas, we have not received any additional feedback on that topic.

You might ask why we aren't writing more clearly already, or why our content isn't better organized so our readers don't encounter problems in the first place. Our response would be that we spend a lot of time trying to do these things. We think about the audience's vocabulary and tasks, develop scenarios and use cases, and use personas to describe readers' levels of expertise and interest, as well as other methods. But we know that questions will arise, and we have found our feedback form to be one more tool in our toolbox to help us continually improve our content.

Enabling conversations between your writers and your readers can help your writers better know your audience and improve the documentation for future readers. The relationship can also help your customers be more engaged and successful with your products. The more successful your readers are in using your products, the more likely they are to continue using them and to recommend them to other potential customers. ExactTarget has built its reputation and success on facilitating just this kind of one-to-one communication.

Road Blocks to CMS Adoption

Paula Toth & Gina Gotsill, TechProse

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Paula is the TechProse team's in-house subject matter expert on DITA and single-source solutions. With nearly 20 years of experience in technical communications, she is passionate about helping organizations streamline and reuse their content. She has worked with TechProse since 1990 and has managed single sourcing projects for small firms and large corporations. For the last nine years, her focus has been single-source analysis, development, and information architecture.

In addition to her work with these solutions, Paula has years of experience in information design, instructional design, content development, help system development, marketing writing, and process and procedure development.

In today's content-driven marketplace, organizations have discovered they must serve two masters when creating their content. First, there are corporate drivers that demand reducing cost while increasing quality, usability, and reusability. Second, users demand immediate answers and content that is accurate and personalized to their needs. These trends have led to an increase in Content Management System (CMS) adoption and a movement to treat content as a corporate asset.

At TechProse, we have treated content as a corporate asset for years. We have found other organizations also embraced this concept and are actively using a CMS. Others are on their way, but many more are not sure what their first step should be, or how to make a compelling business case to upper management. Some clients have tried and failed to adopt a CMS, while a handful of others are in denial about the need to modernize and streamline their processes.

In January 2011, as our Best Practices Leader and "Single Sorceress" Paula Toth prepared for her presentation at CMS/DITA North America, TechProse created a survey to learn more about why organizations resist CMS adoption. What are the obstacles? And, for the organizations that are using a CMS, what are the benefits? This report summarizes our findings and provides insight into the reasons why some organizations are using CMSs and why some are not.

CMS Adoption Has a Long Way to Go

While TechProse and other organizations know the value of using a CMS, it's easy to see that many organizations are still on the fence. Just 29 percent of respondents work for organizations that have implemented a CMS solution. Organizations find there are multiple obstacles to adopting a CMS. Highest on the list is cost. Respondents also revealed that employees have expressed resistance to any mechanism that provides version control. Others said their organizations are too small to reap the benefits of a CMS. "We are handling fewer than 50,000 pages," one respondent said.

Indeed, CMSs have plenty of skeptics. "I haven't researched any CMS software so I don't know the cost but I'm sure there's a decent upfront cost for the software," one respondent said. "More importantly, I think the man hours we would have to put in to get the CMS up and running are significant."

Others took the "if it ain't broke, don't fix it" approach. "What we are currently doing is so easy; takes almost no time," a respondent wrote. "Adding another layer would add time, not save time."

Other obstacles to CMS adoption included the inability to get funding to pay for large initial license fees and implementation costs. Other organizations lack a champion who will build a business case to make such an investment, or they can't demonstrate the return on investment.

Organizational culture is another formidable obstacle to CMS adoption. "Focus/culture is on sales," one respondent wrote, "not the details of workflow or employee productivity." And, some organizations are siloed; worse, they separate documents and won't work together to share content. One respondent reported that most of the writers on the team don't see a problem with how work is currently being done and they're against a proposal to move to a CMS.

CMS Alternatives

Nearly 50 percent of technical communicators not using a CMS have implemented version control systems and 54 percent use the file system of their computer's operating system to store content. While these methods provide

storage and can be used to address version control, they do not help authors find reusable content, nor do they make content easy to find.

To find a file, 33 percent of those not using a CMS use the file search capabilities of the computer's operating system. We suspect that this process is not fool-proof and requires multiple searches to locate documents in folders on various servers. Nearly 71 percent of respondents also said they use manual processes to manage workflow, such as emailing files and updating status as a part of project management. Nearly 30 percent use spreadsheets and 10 percent use Microsoft Project and similar tools to track document work flow. Few, if any of these options help authors find reusable content.

Benefits of Using a CMS?

CMSs have long been linked to content reuse, which can drastically reduce content development costs. The majority of respondents, 69 percent, said they work faster and more efficiently with a CMS. Others reported they have shortened their time to market, lowered the cost of developing content, and greatly streamlined the translation process.

Respondents report they can be more responsive to their user communities when errors are found in existing documents, saying "We are able to make corrections and updates to already-published content."

One respondent used this formula to express the increased business value of the content: easy to use search and navigation = finding content = more reuse = more consistency. And another stated a CMS, "would make it easier for people to search for content that's already available and can be reused, if needed."

We asked respondents if they thought their team could work faster or more efficiently if they had a CMS, or if they could shorten their time to market and reduce the content development costs. Nearly 67 percent of respondents said yes, all of the above. They complained of siloed departments, redundancies across document families, and inefficient authoring, workflow, and review processes. Teams also need a lesson in collaboration.

Respondents also noted a CMS could alleviate issues created when people work on local machines and then copy files to the server that overwrite content that was previously updated by other writers.

Another respondent's comments highlighted one of the greatest benefits of a CMS solution. "Source material is created and stored in at least four different tools by seven writers," the respondent wrote. "I think that says it all."

Not all respondents who have implemented a CMS are singing its praises. A few commented that while they had implemented a CMS, they had not yet seen the benefits from the solution. In our experience, organizations must do more than simply implement a CMS to achieve cost savings and efficiencies. They must adjust the architecture of their content to get maximum content reuse, as well as optimize their processes and workflows to gain efficiencies. Putting thought into making these adjustments pays off when you reap the benefits mentioned in this report.

What's Out There?

Organizations that choose to implement a CMS solution will find a wide range of options. Survey respondents reported using solutions such as Astoria, AuthorIt, SDL Trisoft, DITA Exchange, DocZone for DITA, Microsoft SharePoint, and Vasont.

The obstacle of CMS cost can be directly addressed by opting for a SaaS solution if your content lends itself to being externally hosted. Astoria, SDL Trisoft, and Vasont are tried and true standards who have both traditional CMS and fully hosted SaaS offerings. Componize has a traditional CMS and is capable of offering it as SaaS solution if you ask about it. DITA Exchange is based on SharePoint and has a fully hosted SaaS solution available. DocZone and EasyDITA are contemporary companies who went straight for SaaS solutions right from the start. If you need to keep your data behind your own firewall and are cost conscious, Easy DITA and SiberSafe offer deployed SaaS CMS solutions and Suite Solutions' X:Point offers a low-cost Microsoft SharePoint solution.

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A journalist at heart, Gina Gotsill has written about a wide range of business topics, including training boot camps and teaching finance to non-finance professionals. In 2010, she co-authored Surviving the Baby Boomer Exodus: Capturing Knowledge for Gen X and Y Employees (Cengage) with TechProse co-worker Ken Ball.

Summary

In summary, we learned that technical communicators are creating a wide range of content, from technical documentation to web content to training, support, and marketing materials. Even though there are many CMS options to choose from, only 29 percent of respondents work for an organization that has implemented a CMS. Technical communicators who use a CMS report that they work more efficiently and have shortened their time to market. They have lowered the cost of developing and maintaining content by employing content reuse, and enjoy the benefits of quickly making corrections and updates to already-published content.

If you are like 67 percent of the survey respondents who think that a CMS can reduce development costs and increase work efficiency, there is no reason to let the obstacles to CMS adoption stop you. If you can make a sound business case for cost savings and efficiencies, an affordable CMS solution might well be within reach.

The Survey

On January 24, 2011, TechProse launched an email blast that contained a link to our survey, CMS Adoption Obstacles, to several hundred people in our network. We also used social media to expand the survey's reach and asked several CMS business and thought leaders to post the link to their blogs. By the time we took the survey down in mid-February, we had received 100 responses.

Who Responded?

Nearly half of our respondents were content developers and another 20 percent were a mix of software developers, marketing writers, information architects, and managers. We also received responses from a few editors and librarians. Nearly 80 percent of respondents create technical documentation; the rest create training materials, support, and marketing materials, and web site content. Nearly 70 percent of respondents do not use a CMS to develop content.

BY THE NUMBERS

A TechProse CMS Obstacles Survey (100 respondents)

69% Don't use a CMS

49% Use version control

54% Use file/folder organization

71% Use manual workflow

Percentage that don't adopt a CMS because...

54% It's too expensive

38% IT can't support it

28% No one will champion it

26% Configuration takes time

13% It's cumbersome to use

CIDM Upcoming Conferences

Best Practices 2011

September 12-14, 2011
San Antonio, Texas
<http://www.infomanagementcenter.com/bestpractices/2011/index.htm>

Best Practices is the premier annual conference for managers of information development, training, and support. You learn from your colleagues the best ideas and innovations in the industry. You discover how organizations are pursuing social media, dynamic publishing, content management, enterprise-wide information creation through wikis and blogs, and much more. You have the opportunity to interact with a community of peers, all of whom are struggling with many of the same challenges that you are. You learn about the experiences of managers and organizations that have introduced amazing innovations or seen significant increases in effectiveness and productivity.

DITA Europe 2011

November 7-8, 2011
Prague, Czech Republic
<http://www.infomanagementcenter.com/DITAeurope/2011/index.htm>

Content Management Strategies/DITA Europe first introduced the international DITA standard to the European community of information developers. It brings together managers, information developers, technology specialists, and tools vendors to exchange their hard-won knowledge and experience. Participants return year after year to learn how best to implement content management systems and the DITA standard in their organizations. Veterans help those just starting out or just beginning to explore their options and profit from the challenges they have overcome and then learn from both their successes and pitfalls.

Content Management Strategies/DITA North America 2012

April 23-25, 2012
La Jolla, California
<http://www.cm-strategies.com/2012/index.htm>

Content Management Strategies/DITA North America first introduced single sourcing, content management, and the DITA standard to the information-development world. This conference brings together managers, information developers, and technology specialists so that they can learn from one another how best to implement content management. In its 14th year, CM Strategies attracts an audience interested in improving the quality of information they deliver to customers at the same time that they increase the effectiveness and productivity of their organizations. Participants learn from the experiences of colleagues, both successes and pitfalls. Through the exchange of knowledge and innovations, everyone increases their understanding of the challenges of managing content through the sound use of technology and critical process improvements.

Creating a Customer Information Program: Nurturing customer relationships and leveraging feedback

Dawn Eisner, NetApp, Inc.

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Dawn Eisner is a Customer Program Manager for the Information Engineering team at NetApp™. She has thirty years of international experience in the high tech industry, including roles in new product manufacturing and engineering, program management, customer product-line management, and technical communications. Prior to joining NetApp in early 2006, Dawn worked for EMC, where she represented the user experience on an award-winning documentation architecture team. At NetApp, Dawn manages a Customer Information Program to connect content developers with customer feedback and is a key member of the corporate Customer Listening Program.

Collecting customer information is critical to the content development process, but the data gathered can also drive organizational and enterprise-level knowledge management changes.

How the NetApp Customer Information Program Began

NetApp senior management created a position that would help content developers within the product documentation team (Information Engineering) get a better understanding of customers' and partners' technical documentation requirements with the goal of improving technical documentation content.

NetApp already had several ways for employees to connect with customers directly, but some of the programs involved a non-technical customer audience and Information Engineering's (IE) audience is technical. Some programs had a more technical audience, but they had closed participation to only the Marketing and Product Management functions. While gathering information about customers from these programs, we had to create other ways to interact directly with customers.

Identifying Existing Feedback Avenues to Get Started

Feedback was already available from many avenues, but content developers were not fully using it or could not access to it efficiently and effectively.

- We had a feedback email address in all of our published documents, but we were not routinely responding or tracking the actions taken or reviewing feedback for issue themes.
- Support offered an opportunity for content developers to sit with representatives as they took customer calls. This opportunity enabled content developers to see when and how Support used the documentation to resolve customer situations. However, the IE team had globally located members, and Support was located in only one site at the time. The opportunity was more effective when the two representatives were co-located.
- Senior Support representatives met quarterly with product operations representatives to discuss customer top problems, but IE was not included in these meetings and often heard about generic documentation problems months later, often too late to investigate and respond appropriately.
- Field personnel regularly complained to their contacts within NetApp about content issues, but by the time content developers received the message, the problems were not clear enough to take action.
- NetApp already had a corporate Customer Listening Program and conducted an annual customer survey. The survey results for documentation were unsatisfactory. The team managing the corporate program wanted the IE Customer Information Program to investigate and create action plans to address the root cause of the discovered problems.

All of these avenues gave IE some specific usability and accuracy feedback that would improve the existing content, but some customer improvements required participation and change from groups outside of IE. For the program to make effective use of any of this feedback and to make changes in other groups' processes, we needed to develop proactive internal procedures and open cross-functional communication.

Building Relationships and Credibility with Documentation Users

Because IE had not been consistent in any one approach to user feedback, it was necessary to build credible relationships with both internal and external feedback providers. Developing better relationships meant creating processes and responding to feedback in a consistent and complete way. The four things we needed to do to earn back the trust of our customer community were

- **Acknowledge the feedback—always!**
  Nothing defuses negative feedback like the willingness to really listen and acknowledge the complaint. An appropriate response requires empathy and a certain detachment from the content, but it is one of the most important things to do well. Good content developers should be able to put themselves in the customer's situation and imagine what that customer might experience with the product or the instructions they have provided.
- **Determine how to address the issue and validate the fix with the feedback provider.**
  Asking users if the action taken addressed the issue adequately gave us another chance to make sure we were addressing the right concern in the right way so other users could avoid the situation.
- **Fix the issue.**
  Follow-through builds credibility.
- **Tell the feedback providers their issues are closed and thank them for their time and effort.**
  A closed-loop process builds credibility, the thoroughness inspires confidence, and expressing sincere gratitude shows customers you appreciate their time and effort.

These are the cornerstones of any good customer program.

Creating Processes that Support Successful Feedback Follow-Through and Metrics

IE developed a process in which management acknowledged and responded to the feedback within a short, specific timeframe. The manager thanked the provider and communicated who would be responding with more detail. The assigned person

- Opened a documentation bug report
- Notified the feedback provider of the actions taken
- Verified that the actions addressed their issue
- Fixed the problem
- Closed the bug report and thanked the feedback provider again

When the Support team expanded globally, IE learned how difficult it was to find troubleshooting instructions within our content. IE arranged for content developers to participate in customer calls with Support representatives. Observing the Support personnel, feeling their sense of urgency to find the right answer and respond to customers' needs under pressure, gave content developers a new perspective.

> ***"... it was necessary to build credible relationships with both internal and external feedback providers."***

Working with Senior Support representatives on common product usability issues also helped content developers understand the importance of making certain content stand out in search results and prioritizing content that addresses the most common customer issues over other, less critical content. IE could also work with product development to include

the usability improvements in the next release. Support representatives felt heard and valued by the content developers and a partnership developed between the two groups.

Our field personnel were most vocal about the real-world issues customers were having with documentation. Giving field personnel a clear avenue to provide feedback to the IE management team, and quickly acknowledging, addressing, and closing their issues, improved our reputation more broadly within and across the internal customer-facing and external customer communities.

Improving IE responsiveness to the feedback of these critical internal organizations and external customers began to elevate the value of the group. Creating processes that supported follow-through made us more responsive. Tracking the feedback loop created a consistent approach. Metrics enabled us to use the data gathered to highlight group achievements and gaps.

Investing in Corporate Customer Listening Initiatives

NetApp has a corporate Customer Listening Program team that collaborates with Walker Information, a customer strategy and consulting firm, to help design and implement the program effectively. Investing in IE representation on this team allowed us not only to help shape product documentation survey questions, but also to help other teams and functional areas like Quality, Training, IT, and Product Development understand the survey results and learn how to use the feedback to develop action plans in response. This cross-functional experience gave IE an enterprise-level picture of user documentation and presentation needs. It also placed IE in a position to represent the user experience cross-functionally, offering value in additional areas across the company.

IE followed up with the customers who commented negatively about product documentation. Their responses to the question, "What is the most important improvement we can make to the technical documentation?" revealed that about 30-50 percent of the customer complaints about technical documentation were actually related to unsatisfactory search results and content presentation on our Support site. Content was difficult to find and the search engine was insufficient to meet today's customer requirements for quick access to documentation. Through the survey, we finally had supporting customer data to share with executives. The executives funded a program to improve the web site and invest in a new search engine.

While correcting the website problems would improve customer ability to find the documentation, we still did not have enough specifics about the customer content issues to take further action.

Evolving the Corporate Customer Listening Program and Getting the Most from the Survey

IE needed to refine the questions to get more specific and actionable feedback for the rest of the dissatisfied customer feedback. As the corporate Customer Listening Program has grown, survey refinement has become part of the yearly process.

In FY10, we created a completely new technical documentation section within the survey. We wanted to determine the specific types of content about which customers' perceptions and behaviors were negative. The feedback provided valuable information, such as

- which content is most used by customers
- which tasks are customers usually performing when they look for documentation
- when customers look for information, what type of content do they most want
- where do customers look for that documentation
- how do customers want to be notified when content is updated
- what are the specific opportunities for improvement

The data from this survey helped us put the customers' comments in context of the

customers' task, mindset, and task path, so we could see the problem areas more clearly. Armed with the details, the Customer Listening Program team recommended to the CEO and staff that we focus on, and invest in, improving the technical documentation and addressing related customer improvements with the web site. The Customer Listening Program facilitated the creation of a team with members from key author groups. That team presented a proposal for an enterprise-information architecture review, new tools and technology, better collaboration, and a request for executive sponsorship, team empowerment, and funding to mandate new standards and guidelines for content beyond product documentation. The survey data highlighted the need for an enterprise-level approach to the information we provide to customers. Enterprise knowledge includes more than just product documentation. It includes the troubleshooting content in our support knowledgebase, as well as White Papers and Technical Reports provided by our Marketing organization.

Creating Goals and Incentives for Customer-Focused Behavior

When the Customer Information Program first started, the content developers were very excited that they were finally going to get customer feedback about their specific content. They said they were anxious to understand how customers used what they wrote, but we rapidly found that defensiveness and dismissal were common reactions as if customers just did not understand how content was developed. Some lessons we learned were

- Not all content developers are comfortable communicating directly with customers.
- Customer issues are unpredictable. Content developers had to learn to accept feedback timing graciously.
- Some content developers could not detach emotionally from the content they provided, and that affected their ability to listen objectively and react to feedback.
- Even though some content developers were incorporating the feedback, the handling of feedback was inconsistent.
- Managing customer feedback was not part of content developers' measurable goals.

Because of these lessons learned, IE made customer responsiveness a performance review goal and researched potential training and development opportunities in soft skill areas for those who needed to improve. The level of direct customer interaction and cross-author team interaction was increasing, so new listening and communication skills were required.

As an incentive for customers to provide feedback and to make responding to feedback more fun, we created a Customer Focus award. Feedback providers and content developers are eligible to receive the award, along with an award certificate.

Feedback providers who give the most valuable and consistent feedback are often winners of the award, since we want to encourage them to continue helping us. Content developers who routinely show openness to feedback and who have a truly service-oriented attitude often win the award. We recently created a Super Star Customer Focus award for the person who helped make the best improvement to our customer content or showed exemplary customer focus over the period of a year.

In addition to the award system, we announce positive feedback about content developers on the company intranet. Complimenting team members publicly on customer-focused behavior motivates team members to model behavior that is responsive to customer issues.

An award system encouraging customer focus, team member responsiveness, development plans, and review criteria and measurement has helped develop a more customer-responsive culture within IE. We may also be raising customer awareness outside the department, as evidenced by requests for the Customer Information Program Manager to present customer feedback to product development teams.

> *"The Documentation Advisory Council serves as a review group outside of the normal technical review process ..."*

Using Feedback to Highlight the Importance of Good Content Reviews

IE found that some of the customer content issues were the direct result of insufficient reviews and inadequate review processes. While a developer might find the documentation to be technically accurate, it was sometimes incomplete or vague when followed in a complex customer environment.

We developed a Documentation Advisory Council with members from Support, field personnel, partners, and customers who had exceptional interest in the improvement of our content. The Documentation Advisory Council serves as a review group outside of the normal technical review process and gives us a better sense of how customers and partners will receive the documentation as they apply it in a much more complex, real-world environment.

IE is researching automated review tools that would allow content issue identification and highlight the weaker review areas for improvement.

Using Metrics and Data to Drive Change

On a monthly basis, IE tracks and reports the feedback email statistics to IE senior management:

- Percentage of feedback received and acknowledged
- Geographical origin of feedback percentages
- Content that receives the most feedback
- Percentage of Internal versus external customers providing feedback
- New, in process, and closed Bug report numbers

Tracking these data points over time helps us see changes in geographical and customer feedback trends, identify which documents get the most feedback and in what areas, and make sure we continue to respond effectively. We can use this data to understand whether we have enough resources or content developers with the right skill set assigned to the most problematic areas of content and to verify the success of our review process changes.

Data collected from all of the various feedback avenues gives us a platform to communicate areas that affect the customer experience with documentation. For example, we have evaluated the

- Developer-to-writer ratio gaps against the industry standard, which is helping us attain new, skilled content development and illustration resources to meet customers' changing needs
- Need for exploration of and innovation through new technology, enabling us to create a customizable content delivery proof of concept
- Need for content development, publishing, and web site publishing process flexibility and automation
- Benefits of a content model based on Darwin Information Typing Architecture (DITA), where audience experience level, localization, and personalization are critical, highlighting the team's accomplishments in this area
- Importance of our effort to incorporate appropriate metadata to improve search results
- Critical nature of working closely with IT on search engine optimization, content management, and presentation

- Need for a corporate-level information architecture and enterprise knowledge management strategy

The corporate Customer Listening Program is well on its way to being an established, repeatable, and measurable corporate program with a positive impact on revenue. We have three years of data from our annual corporate Customer Listening Program survey to give us an assessment of our year-to-year ratings patterns and help identify areas of focus. Involvement in the NetApp Customer Listening Program has helped IE highlight the issues with the company's publications that we can only address through higher-level corporate improvement initiatives.

- NetApp executives use the results and program recommendations to determine where to place corporate focus and investment. The CEO creates a video in which he thanks customers for participating in the survey and communicates the top three issues the company will address, based on their collective feedback.
- Business units use the data collected to create improvement action plans.
- Sales Account teams use the feedback to address revenue opportunities or correct any potential issues with individual customer account members. Account teams close the feedback loop by letting the customer know the actions planned by the company in response to their specific feedback, as appropriate.
- We can now show that the customers whose account teams directly acknowledged their feedback spent more with NetApp in the following year than customers whose account teams did not close the loop with them.
- This last bullet is significant for our documentation team. How customers rate our products and related features is an important contributing factor in how loyal they are to NetApp. Customers that are loyal to NetApp invest more with us. If documentation is truly part of the product, and we follow up appropriately with customers to close their issues, then we can attribute at least some portion of the resulting increase in sales to technical content.

Summary

It takes at least three years to develop a solid Customer Information Program and ours is still evolving. If you can identify existing feedback areas, you will likely uncover process and skill weaknesses. Ensure a closed-loop process to build a credible program. Address process issues first to determine what customer skills are required and where your team may require development. Create incentives, metrics, and goals to encourage a customer-responsive culture. Show early successes to help your program gain momentum. Get involved in customer-facing initiatives, see where you can add value, and then figure out how to use the relationships to benefit your program.

Key points for a successful Customer Information Program:

- Identify and leverage existing feedback avenues.
- Build credibility by acknowledging concerns, fixing problems, and closing the loop with anyone who provides feedback. Remember to thank them for their time and effort!
- Create processes to deal with feedback consistently.
- Investigate corporate customer feedback programs and get involved.
- Create incentives and make being customer-focused part of the group culture.
- Look for opportunities to use feedback themes and metrics to drive change inside and outside of the content development organization.

Developing a Customer Information Program is not only critical to getting content developers the information they need to improve documentation. It can also give you the customer data you need to highlight the importance of great customer-facing technical content to your executive team.

Please visit our web site at www.infomanagementcenter.com for more information on these and other events.

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NLDITA 2011
June 1, 2011, Utrecht, The Netherlands
<http://bureau.nldita.nl/?lang=en/>

ATA e-Business Forum and S1000D User Forum
June 6-8, 2011, Montreal, Quebec, Canada
<http://www.ataebiz.org/forum>

PlanetPTC Live
June 12-15, 2011, Las Vegas, NV
<http://live.planetptc.com/>

Webinar—DITA Metrics in Production: How, when, where and why (and how much?)
June 16, 2011, 11am EDT
<http://www.comtech-serv.com/webinar-ditametrics.shtml>

DITA Boot Camp
June 20-24, 2011, Fresh Meadows, NY
<http://www.comtech-serv.com/workshops/ditabootcamp.shtml>

mLearnCon 2011 Mobile Learning Conference & Expo
June 21-23, 2011, San Jose, CA
<http://www.mlearncon.com/>

Webinar—Customized DITA Documents Delivered Using SharePoint
June 29, 2011 12pm EDT
<http://www.comtech-serv.com/webinar-sharepoint.shtml>

Minimalism: Creating Information People Really Need
July 12-13, 2011, Quebec City, Canada
<http://www.comtech-serv.com/workshops/minimalism.shtml>

DITA: Getting Started
August 17-18, 2011, Colorado Springs, CO
<http://www.comtech-serv.com/workshops/dita.shtml>

Best Practices 2011
September 12-14, 2011, San Antonio, TX
<http://www.infomanagementcenter.com/bestpractices/2011/index.htm>

Future Leaders Conference
September 14-15, 2011, Chicago, IL
<http://www.conferenceboard.org/futureleaders>

Federated Conference on Computer Science and Information Systems
September 19-21, 2011, Szczecin, Poland
<http://www.fedcsis.org>

Developing a Content-Management Strategy
September 20-21, 2011, Redmond, WA
<http://www.comtech-serv.com/workshops/content_mgmt.shtml>

International Legal Translation Conference
October 7-8, 2011, Lisbon, Portugal
<http://www.tradulinguas.com/>

SDL Global Information Management Conference
October 11, 2011, Amsterdam Netherlands
<http://www.sdl.com/en/language-services/events/2011-10-11-gim-amsterdam.asp>

Computational Linguistics-Applications Conference
October 17-19, 2011, Jachranka, Poland
<http://www.cla-conf.org>

tcworld Conference
October 18-20, 2011, Wiesbaden, Germany
<http://www.tekom.de/>

DITA Europe 2011
November 7-8, 2011, Prague, Czech Republic
<http://www.infomanagementcenter.com/DITAeurope/2011/index.htm>

CMS/DITA North America 2012
April 23-25, 2012, La Jolla, CA
<http://www.cm-strategies.com/2012/index.htm>