BEST practices

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Inclusive Terminology and Its Adoption in the Workplace

Kripa Venkat, Texas Instruments

Diversity, equity (not equality), and inclusion, collectively known as DEI, are common themes across the industry to ensure people are valued and respected in the workplace. One can claim that these already exist; however, it becomes hard to validate these claims without clear objectives, detailed evaluation, and supporting results. Let us step back and look at the basic definitions of the three terms diversity, equity, and inclusion and its relevance to people in the workplace.

Diversity is conceptually a practice of involving people of various genders, races, religions, socioeconomics, regions, lifestyles, experiences, and thought processes into every undertaking at the workplace or otherwise. The easy ability to quantitatively measure diversity makes it easier to track gaps, take measures, and monitor progress. Success metrics are typically numbers or percentages and resonate well with individuals, leaders, and decision makers at the highest level in any organization. Most large corporations have a DEI organization that adopts policies and create working groups with a single goal of increasing the numbers for diversity. Seems to be a simple task to implement, but that is not always true, especially driving change without creating disruptions or obstacles to conduct business effectively.

Equity is a term that establishes fairness to everything one does, and is easily confused with equality, which is more mathematical in nature. Equity borrows certain traits of diversity and applies adaptive fairness to individuals with diverse backgrounds, since not everyone starts life in a society from the same place. One must acknowledge that and adjust with balance as actions are identified and measures taken. Equity is measurable but not quantitatively all the time. For example, it is easy to quantitively measure compensation for equally experienced folks in the workplace, but not easy to measure if employees are treated fairly and with respect. A combination of metrics and survey results helps in coming up with a total measure of success to equity. Like diversity, the goal of the DEI organization is to have an increasing trajectory of metrics for equity.

Inclusion, or inclusivity in the workplace, is an initiative to ensure all individuals feel included, accepted, valued, respected, acknowledged, tolerated, safe, supported, and given a seat at the table during important discussions, thus enabling full participation in decision-making within any group or organization. Inclusion is expected to naturally unlock the best potential of employees resulting in overall success to retention, collaboration, productivity, innovation, execution, and business results. Inclusiveness is by far the hardest measurable amongst the elements of DEI since it can be measured only by evaluating the mindset of individuals. One cannot put a number beside a varying degree of perceptions and experiences of employees in the workplace. Organizations have tried hard to find ways to extract useful metrics for inclusion through surveys, face-face conversations, and asking objective and thought-provoking questions, but it has been a hard journey to come up with efficient methods.

Now that an introduction has been given to DEI initiatives, their goals, and measurables, we will move our focus to inclusive language. Inclusive behavior is one's ability to consciously follow a set of traits and attributes aligned with the objectives to make others feel included. Inclusive language uses expressions or words that help people feel respected and represented.

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From the Director

Dawn Stevens

Kathy's Next Adventure

As most of you know, Kathy Madison is retiring at the end of September after almost seven years here at Comtech / CIDM. Her adventure with us started when JoAnn Hackos, the founder of Comtech and fellow birder, noticed Kathy was carrying a tote bag from Wind River, one of our past clients and CIDM member as well as Kathy's former employer. They got talking and realized they worked with many of the same clients, including Qualcomm, HPE, Juniper Networks, Nortel, Intel, Tektronix, Agilent, Motorola, and Nokia. Kathy decided to leave the world of software sales and joined Comtech, bringing her management, marketing, and software engineering skills to the role of CIDM Member Liaison.

She quickly immersed herself in the information-development community, recruiting new CIDM members, working with clients on process and user studies, moderating round tables and webinars, conducting member surveys, contributing to the CIDM newsletters, and of course, networking. When she wasn't interacting with clients, members, or our vendor partners, Kathy always volunteered to take on new endeavors such as redesigning the CIDM website, writing consulting proposals, and being my sounding board for business decisions that have benefited most of you. As a non-stoppable ball of energy and optimism, Kathy has been an integral part of our team.

Outside of work, Kathy loves all things outdoors; she volunteers at her local nature center and is on the board of directors of Evergreen Audubon. She's an avid hiker, kayaker, birder, snorkeler, and quilter, where she often creates nature-inspired works of art.

Aspens Through the Seasons

Colorado Greenback Trout

In her retirement years, Kathy plans to travel the country with her husband doing the things she loves — I believe there is a camper of some sort in her future! There will also be some international travel, with Costa Rica, Belize, Bonaire, and New Zealand high on her bucket list.

Birding at Evergreen Lake

Evergreen Nature Center

When not traveling, she'll be busy with the nature center and her quilt projects — she is known for making wedding quilts for her nieces and nephews, of which three are getting married in 2023. She also has plans to create a fabric collage quilt of an owl which she already knows will take many hours to make.

Kathy's last day is September 29th. Please send her retirement wishes and advice (Kathy.Madison@ComtechServices.com). On behalf of Comtech and CIDM, we will miss seeing her always smiling face but rest assured, you'll be in good hands with Trish Grindereng, who's taking over Kathy's responsibilities.

Dawn

CIDM

The Center for Information-Development Management is an organization of information-development, training, and support managers from around the world. The CIDM facilitates collaboration regarding information development among skilled managers in the information industry.

As a CIDM member, you will receive many member benefits, including a free newsletter subscription, conference registrations for our annual conference and discounts on Comtech workshops. You also gain access to the member's website with archives of past newsletter articles.

The most significant benefit of membership will come from the contacts you will make with colleagues in information development.

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Inclusive language avoids the use of certain expressions or words that might be considered to exclude groups of people based on their sex, gender, race, color, religion, and so on. Using inclusive language creates an environment that unlocks everyone's potential, enables everyone to feel respected, values our differences, and encourages people to put thoughts and ideas on the table.

To adopt inclusive language, one must make a conscious effort to replace antiquated and potentially offensive terms and make the workplace more accepting and safer. The benefits of using inclusive language can be summarized below:

- Enables all to feel included in any topic discussed, irrespective of color, race, gender, ethnicity, age, social status, religion, abilities, beliefs, and orientation.
- Removes colloquialisms that are exclusive or usually not well understood by all.
- Helps maintain neutrality, avoiding unpleasant emotions or connotations brought on by more divisive language (for example, the term elderly might have different connotations based on the age of an employee).
- Adopts a style of language that avoids expressions and terms that could be considered sexist, racist, exclusive, or biased against certain groups of people.

Instead of focusing on the root or the origin of the terms, understand the impact of them on a very diverse group of people.

To adopt inclusive terminology, it is important to identify words that are potentially offensive or non-inclusive. Words that are non-inclusive fall into these categories; ableist, violent, racially charged, and gendered.

Ableist language is any word or phrase that devalues or discredits individuals with a disability. The traits of ableist behavior are discrimination and social prejudice that people of disabilities are abnormal and not important in the society. Examples of ableist language include blind, dumb, insane, crippled, disabled, dummy, third world, first-class citizen, lame, suffer-from, and many others. It is important to note that using these words in the right context is perfectly acceptable, but not when used to describe one's day-to-day challenges.

Violent language is words or phrases that are borrowed from language used to describe violence or acts of inhumanity in society. The reason that these phrases do not belong in regular conversations is because they induce fear, violent thoughts, remind people of trauma, and drive usage of unnecessary aggressive vocabulary. Examples of violent language include phrases like take a stab at it, shot in the dark, give it a shot, take a shot at it, under the gun, shoot me an email, bite the bullet, blow up in your face, and many others. These phrases do not belong in regular conversations in society and can easily be replaced with inclusive terms.

Racially charged language is any word or phrase that has racist connotations. Using such words, intended or not, is unacceptable and is an ugly reminder for the ones affected by the horrors of history. The terms that come to mind first are the uses of master and slave, either as a pair or independently. Usage of certain terms such as master and slave have been in existence for over a hundred years to showcase behavior of two or more mechanical devices operating together. These terms were never really intended to be racist or support racist behavior. In addition to these terms not intended to be offensive, these terms best described the functionality of two-systems, one smart and superior, called the master, and the other inferior and an insubordinate doer, called the slave. But moving away from them has been the crux of adopting inclusive terminology.

Gendered language is a group of words that are biased towards one gender. These words are easy to spot since they typically have the suffix or prefix man to a word. Historically, these words were accepted and there wasn't any strong resistance to using them in day-to-day conversations and publications. However, with the DEI efforts to track down non-inclusive terms, a change is being adopted to move away from gendered to gender-neutral language.

Kripa Venkat
Texas Instruments

Kripa Venkat is a content specialist and technical documentation manager at Texas Instruments (TI). He has 20 years of experience with customer facing roles and holds a Master's of Science degree in Electrical engineering. He also holds a Senior Member of Technical Staff title at TI and his passion includes technical content creation, editing, and publishing to help hundreds of TI customers worldwide.

So far, we discussed the shift towards adopting inclusive language with various types and examples of non-inclusive terms. Going deeper into using inclusive terminology, we delve into the use of non-inclusive terms to technical topics. It is interesting to note that when describing technical topics, for example, within semiconductors, many of these words have found their way in, and it has been hard to find a way out. The instances that have been using these words are language that is used to describe hardware, software, firmware, graphical user interfaces (GUI), device architectures, systems and applications, wired/wireless interfaces, and others.

The most intriguing example continues to be the usage of master/slave for several specific use cases. As described earlier, a superior or controlling system connected to several inferior or subordinate systems is very prevalent in electronic systems leading to the wide usage of master and slave. While it is hard to find a single replacement to fit every use case, suggested replacements include main/secondary, primary/secondary, primary/replica, host/target, controller/peripheral, controller/target, leader/follower, initiator/responder, or similar descriptive terminology.

Some of the newer terms introduced are blacklist and whitelist in wired and wireless communication systems. The term blacklist used to describe something (for example, users, websites, emails, or applications) bad, blocked, or not permitted, and whitelist to describe counterparts that are good, allowed, or accepted. This immediately drives to the conclusion that anything black is bad or negative and white to mean good or positive. There have also been other instances of potentially offensive terms such as male or female connectors, to distinguish connectors with pins or sockets.

To find correct replacements to the above-mentioned uses of non-inclusive technical terms, it is proposed that one identifies specific use cases of antiquated terminology within an interface, protocol, and standard; then, partner and align with standards bodies such as IEEE, IEC, ANSI, etc. when applicable and possible. If a standards body gives guidance, the industry adopts it and communicates that to their end users, partners, and customers as guidance.

The table on the following page offers good examples of replacement terms for technical and conversational usages in the workplace.

The adoption to inclusive terminology is going to be a journey, which could take multiple years, or even a decade to set right. But as educated individuals, we have a strong role to play in adhering to some basic principles as we embark on this journey towards the world being a better place to live. In summary, practical ways to implement inclusive language are to:

- ♦ Avoid colloquialisms, metaphors, similes, idioms, and other unnecessary jargon. Plain language is always preferable and considered good, clear word usage.
- ♦ Avoid terms that use black to mean something bad or negative and white to mean positive or less harmful. Biased terms, such as blacklist/whitelist, also may introduce comprehension issues.
- ♦ Avoid terms such as master/slave that perpetuate negative stereotypes or unequal power relationships.
- ♦ Avoid identifying an individual's gender unless necessary for comprehension or using terms that assign a gender to inanimate objects, such as male/female connectors.
- ♦ Ask yourself: Is the use of this term or phrase central to the meaning of the work? Can I convey the intended meaning using more inclusive language?

References and additional resources include

- INCITS Inclusive Terminology Guidelines
- NIST's Inclusive Language Guidance Aims for Clarity in Standards Publications
- 5 Key Principles of Inclusive Language and Why they Matter
- APA: Bias free language
- Inclusive language in Technology
- https://joinhandshake.com/blog/employers/70-inclusive-language-principles-that-will-make-you-a-more-successful-recruiter/
- Accenture: Why now is the time for inclusive language
- Using gender inclusive language

NON-INCLUSIVE TERMS	ANTIQUATED USAGE	PREFERRED USAGE
Man-hours	It is going to take 20 *man-hours* to get this completed.	It is going to take 20 *person-hours* to get this completed.
Crazy	I had a *crazy* day today at work and didn't have an opportunity to call you sooner.	I had an *unexpectedly busy* day today at work and didn't have an opportunity to call you sooner.
Crippled	I feel *crippled* on this issue, and I don't have a good answer for you at this point in time.	I feel *limited* on this issue, and I don't have a good answer for you at this point in time.
Blind	I am not very well prepared for the afternoon meeting, and I feel like I am going into it *blind*.	I am not very well prepared for the afternoon meeting, and I feel like I am going into it *unaware*.
Ghetto	The parking lot of the grocery store near my house is really *ghetto*.	The parking lot of the grocery store near my house is really *rundown*.
Hijack	I am sorry to *hijack* this meeting, but I would like to know more about the status of this project.	I am sorry to *take over* this meeting, but I would like to know more about the status of this project.
Crack the whip	I need to *crack the whip* on the sub-team so that they accelerate the deliverables to completion.	I need to get the sub-team *into shape* so that they accelerate the deliverables to completion.
Mankind	The solution that we have created is a boon to *mankind*.	The solution that we have created is a boon to *humanity/humankind*.
Lame	The reasons given for the delays are *lame*.	The reasons given for the delays are *ordinary*.
Master/Slave	SPI devices communicate in full duplex mode using a *master/slave* architecture usually with a single master.	SPI devices communicate in full duplex mode using a *controller/peripheral* architecture usually with a single master.
Master	The password to unlock the flash segment is stored in a *master* location in information memory.	The password to unlock the flash segment is stored in a *primary* location in information memory.
Aggressor/Victim	The EM signals causing the interference are known as the *aggressors* while the EM signal affected by crosstalk is known as the *victim*.	The EM signals causing the interference are known as the *intruders* while the EM signal affected by crosstalk is known as the *resident*.
Disabled	Pin 5 of the chip is *disabled* for external use by an internal connection.	Pin 5 of the chip is *made inactive* for external use by an internal connection.
Male/Female	The 12C signals are available on the board on *male* connector H5, one can use any industry *female* connectors for diagnostics.	The 12C signals are available on the board on *plug* connector H5, one can use any industry *socket* connectors for diagnostics.
Kill	Any external interferencec will *kill* the signal strength available at the CLK pin.	Any external interferencec will *eliminate* the signal strength available at the CLK pin.
Sanity Check	A *sanity check* must be performed before powering-up the EVM.	A *coherence check* must be performed before powering-up the EVM.
Blacklist/Whitelist	Instead of creating a list of threats, you create a *whitelist* of permitted entities and eblock everything else listed in the *blacklist*.	Instead of creating a list of threats, you create an *accept list* of permitted entities and eblock everything else listed in the *reject list*.

Hindsight: A Content Transformation Journey

Tracey Langenbach, FIS

Tracey Langenbach
FIS

Tracey Langenbach is responsible for strategy and ways of working for the Technology Knowledge Services (TKS) team at FIS, a financial services company delivering fintech the financial world is built on. Tracey leverages her 30+ years of experience in education, technical writing, and user-centered design to build and implement a forward-looking set of strategies and tools for the team of 80+ writers in countries across the globe. These writers develop and deliver content for the hundreds of FIS financial products. Tracey has a master's degree in rhetoric with a focus on business and technical communications from U.W. Milwaukee.

When I was in college, I often felt like I was most prepared to take a class after I completed it. By the time I learned the material for the class, I often thought, "Now I get it! If I could take the class again, what I could learn!"

In the business environment, I get the same feeling, the sense of "aha," when I finish a project. I guess this is the classic "hindsight is 20/20." Let me share my hindsight to help you prepare for your next transformation-- whether it is large or small.

Some Background

Before digging into this topic, let me give you a little background. I am a member of the Technology Knowledge Services team at FIS. This 85+ member international team is responsible for documenting most of the products developed at FIS. Prior to 2018, this one team was a distributed group of writers aligned with product teams. When we were pulled together to create a combined team, we were asked to do more with less-- and to do so in a flexible way to respond to shifting project priorities. To achieve this, we needed to build a cohesive team that used the same writing process and the same tools.

Starting Strong: Document the Writing Process

Our first step was to understand where we were starting from. This will be your first step too. You can't make any type of transformation without knowing where you are at—what's your current environment? You need a complete audit of your current authoring environment. This includes everything from your writing standards to your writing process and authoring tools.

Most teams have standards that they follow: writing standards, usage standards, and content composition standards. Make sure your team has them. If they haven't been updated recently, it's a good time to start that process. And speaking of process, make sure you document your team's writing and review process. At FIS, each team had a different writing process. In retrospect, I didn't take the time at the transformation's outset to document the various processes of each team. This slowed us down during the transformation because we had to stop and document the processes along the way.

Only with this knowledge could we understand how new processes would impact teams. Once we understood, we could help each team successfully transition.

Best Practices for Documenting Process

When you review processes or write them for the first time, make sure you define whether your team writes for internal users, external users, or both. Document whether your team writes user instructions, install/set up instructions, implementation instructions, release notes, or something else. Understand why you do or don't write certain materials.

Document the historical decisions for each of these. Perhaps you don't write release notes for one product because all changes are automatically delivered. Document that so you don't have to track down the writer who works with the product and find the information. You want to have the information ready when you need it.

Understand where you are starting from

You'll want a thorough understanding of the tools you use. Document the tools you use to write/edit content, create images, review content, and track projects, and identify where the people can find the instructions are for using them. If you don't have written instructions, you are going to need them. Now is a good time to get started!

Documenting Content Inventory and Deliverables

Next, document your content inventory. Not just the names of the manuals, but titles, chapters, and topics. Don't forget your reuse-- anything that is reused needs to be documented. If you are using DITA, you'll need a record of all your ditavals, filters, and conrefs. You also need to be able to report on what topics and snippets you are reusing.

Not using DITA? I still recommend that you identify your reuse. Other tools, like AuthorIT, Madcap Flare, and FrameMaker, have methods of reuse. Understand what those methods are and how you are using them. Write it down.

Another item you want to record: deliverables. This may seem simplistic, but you still want to record the list of outputs that your team delivers. Expand the simple list to include any formatting requirements, conditions that determine what format is used when, and any other special requirements.

If you move to a new authoring tool, you'll want to understand what the requirements for the deliverables might be. The deliverable requirements should be included in any transformation effort. If you aren't going through a transformation, documenting the deliverables helps you understand your current documentation landscape.

Documents: Know Your Bounds!

Another part of understanding where you are at includes understanding which products you document and which products you don't document. Sounds simple, but it isn't always.

Beyond a basic list, learn the product development processes of teams you do and don't document for. Understand the documentation needs of the clients for each product and how those are being met. While you are involved in these conversations, learn what development process each team uses (Agile, waterfall, something else) and the product's release schedule is.

Also, understand what each team requires as part of its process. At FIS, we had some teams that required content be delivered by specific deadlines before the product release. Other products required that online help be submitted for a security scan along with the product code. Some required that the online help be delivered with the product code for QA testing. Knowing these distinctions ahead of time will make your more efficient in the long run.

You will need this information to help schedule your transformation work and adjust to changes in your schedule. Our well-planned schedule has undergone several changes. Having this information at hand made it easier and quicker to adjust the schedule and let affected people know.

Take a Deep Breath…You've Got This

It takes a lot of time to document this information. You will question why you are doing it and what use it will have. It may even seem meaningless! But I promise you, you'll need it.

In my transformation project at FIS, I had a similar reaction when I first documented our content landscape at a high level. It felt incredibly time-consuming. I really wanted to just get on with the work of acquiring the software and getting teams migrated. Yet we continue to refer to that spreadsheet today. This seemingly unimportant busywork has been valuable throughout the transformation and well-worth the time spent doing it.

> ***"It take a lot of time to document this information…But I promise you, you'll need it."***

That valuable information was only the tip of the iceberg. We needed even more detailed information. So, in the middle of the migration, we had to stop and take the time to do this analysis.

If this sounds like a content strategy, you're right! It is. If you know what your current strategy is, and you have it documented, it will be easier to identify what you need to change.

Aligning with Company Business Environment

Just like you need to understand your writing environment, you'll want to understand your how your company functions. When we started our project, I didn't know any of this information. Luckily, my manager did. Together, we were able to gather the needed information and meet the requirements of various teams. Here are some processes you'll probably need to know:

- **Budget cycle.** Understand when managers propose budgets for the next year and what types of items are included in annual budget requests. Understanding this information helps you collect the right information when working with vendors.

- **Project support.** Every project requires some type of documentation and support. Understand what yours will require. You will likely need a project description, justification, and cost proposal. You may need more than just that. For example, you may need to predict staffing level changes or project cost savings over time.
- **Project Approval process.** The larger the company, the more processes (hoops!) you'll need to go through for approval. For a smaller company, you may only need to share your proposal with your manager and that's it. For a larger company, there'll likely be layers of approval needed—starting with your manager. At FIS, my manger and I needed to involve many teams including my manager's manager (the senior vice president level), a special project funding team, the C-level executive overseeing the special projects team and still others to get the project approved.

A Note on Approvals

The approval process can be complicated. Each approval may require that you present a certain type of information in a certain way. Some approvals want technical detail; some financial, and some the overall project. Even if you have multiple levels of the same type of approval the focus of each level will be slightly different.

Start your elevator pitch now!

As I listed earlier, we had multiple layers of approval for the overall project. For each layer, we needed to understand what type of focus each level of management might want. As the project moved up through the levels, each management tier wanted a more condensed version of our proposal.
The takeaway? Start your elevator pitch now!

Also, companies change their approval processes. The process in place today will likely not be the same process in place when you are ready to pitch your project. You need to balance understanding the current process enough to be able to gather needed information without getting tangled in the details. Keep your finger on the pulse of the ebb and flow of the process and the changes. When you are ready for a project, you'll be ready for the meticulous details, and you'll probably have the contacts you need to work through those details.

A quick word about documents. You are going to need a lot of them. Throughout the process discovery identify what types of documents each stage will need. For example, at the contract stage, does your company require a master services agreement, a statement work, or something else?

Know Your Technology Requirements

I know this may already seem like a lot of information you need to know before you're ready to do anything-- and it is. Still, there's more.

You'll want to understand the technical environment in your company and what requirements there may be for new implementations.

For my project at FIS, I needed to know if we preferred a cloud or on-premise solution. I learned that we required a technical architecture review and technical architecture security review. Of course, I learned this the hard way—after identifying a software solution and starting the process of negotiating the contract. Not knowing this ahead of time slowed down the contract negotiations.

With this knowledge in hand, I was able to engage the technical review teams early for the next software application that we purchased. Having these teams involved from the beginning meant we were able to give them needed documents early in the cycle. These review teams identified that, unfortunately, one of the solutions we were evaluating would not easily fit within our environment. We were able to dismiss that solution and focus on our other options.

It Takes a Village

A large effort will require a large team. This team includes those other areas of your company that help with the evaluation and purchase of the software. They may only be part of your team for a little while, but they certainly help ensure that your project is successful. Here are some of those temporary teams:

- **Purchasing.** Likely your company has a purchasing process you will need to follow. Find out what this process is, and more importantly, make contact with people who can help. That way you will be able to ask questions and stay updated on changing processes.
- **Legal.** If you are negotiating contracts with vendors, your legal team needs to be involved. Find out how this process works. How do you get a member of the legal team involved? What steps do they take? What is the turnaround time for each step?

Other groups will also move in and out of your team to help with the installation. Some of these will be other groups in the company; some may be members of your writing team, and some may be contractors brought in to help with the project. Your vendors are also members of your team. Be ready to bring people in and out of your team as needed.

Dive in with what you have.
We did.

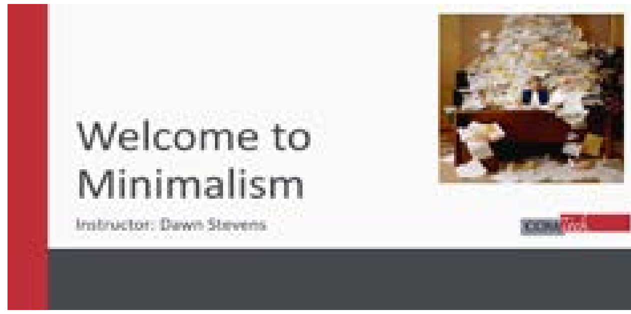
A Final Word of Encouragement

While I encourage you to be as prepared as you can, you will come across something you weren't prepared for. You should attend webinars and conferences to learn as much as you can about the products that you document, the tools you use, and what changes are happening in the industry. But don't use the fact that you don't know everything as a reason to not get started (or to delay getting an initiative underway.)

Trust me, I didn't know a lot of this information. But you'll be surprised how quickly you will learn. You have to start somewhere, right? We dove in with what we had.

Two-Hour Sessions Held Weekly
Every Wednesday
September 28 — November 2, 2022

The goal of technical writers and editors alike is to produce consistent, accurate, and complete information products. Reaching this standard requires a systematic approach to condensation, organization, and correction of the copy. Work through the five levels of editing and gain strategies and tips for creating cleaner content.
https://comtech-serv.com/event/editing-2/minimalism-9-22/



Two-Hour Sessions Held Weekly
Every Wednesday
September 28 — November 2, 2022

Practical application of the four principles of minimalism to select appropriate content for your users, structure it consistently, author it for easy understanding, and make it readily accessible.
https://comtech-serv.com/event/minimalism-9-22/

Two-Hour Sessions Held Weekly
Every Thursday
September 29 — December 8, 2022

A hands-on walk-through of the essential DITA fundamentals, programming skills, and DITA Open Toolkit configurations required to style and publish DITA XML source.

https://comtech-serv.com/event/publishing-dita-9-2022/

Navigating a changing landscape – from Documentation to Information Experience

Michelle Bacigalupi & Neeraj Bhatia, Guidewire

Transformative changes often begin as part of a journey. We started our cloud journey a few years ago. This transition has led to changes in the way we think about, create, and publish content. It has meant not only infrastructural and process changes, but also new ways and formats for delivering information to a wide range of audiences with a whole new set of expectations.

This is our story of transformation, of how we have adapted and are responding to a changing landscape, and how we are driving change.

Building a foundation for success

A significant part of our journey has been building the infrastructure, tooling, and processes to support our evolving content needs.

We transitioned to structured authoring using DITA several years ago and have since matured our DITA implementation and practice. We also use Markdown for some projects and leverage the capabilities of both structures depending on the project and content needs.

Automated validations help increase readability, accuracy, and consistency of content. We use a docs-as-code approach, which includes CI/CD infrastructure for continuous builds and delivery of content. These capabilities help us support rapid release cycles and ensure always up-to-date content.

Our doc site offers a modern web experience for our users. It provides an easy way for users to give feedback, which we can address in minutes.

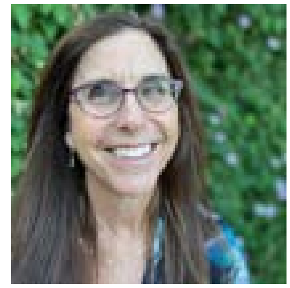
Analytics form a key component of our content lifecycle. We measure and review what works and what doesn't. These analytics are also helping us learn more about our users and make data-driven decisions related to content, taxonomy, and navigation.

As a result of these changes, we have tools and resources to better understand our users' needs and to provide them with the right information in the most appropriate format, when and where they need it. We have the opportunity to think beyond just documentation and move to designing and owning the end-to-end information experience for our users.

Information Experience and our team

Information Experience encompasses the end-to-end journey of how the user acquires and experiences information, and the value that experience adds in helping users succeed. It encapsulates user research, content design, persona-based content, information delivery in various formats, and analytics and feedback loops to measure success.

This transition included taking what we've learned and embracing new approaches to creating innovative forms of content. We use the design thinking paradigm practiced at Guidewire Software. Rather than jumping to a solution, we look at projects strategically. Who are the stakeholders and end-users? What are the goals and timelines? We work collaboratively to define the problem we are solving, define success, and agree on requirements, along with any resource constraints. This design thinking framework empowers us to drive projects and move them forward effectively and efficiently.



Michelle Bacigalupi
Guidewire Software

Michelle is a Lead Information Architect and UX Writer at Guidewire Software, with over 20 years' experience working in mid-size and enterprise organizations. She is passionate about organizational transformation and bringing design thinking to bear on content creation. Most recently, her work as a member of the IX team has focused on reimagining how we approach and define information experience design.

Neeraj Bhatia
Guidewire Software

Neeraj Bhatia is the Senior Director of Information Experience at Guidewire Software. He has over 23 years' experience building and leading global teams, managing content needs for enterprise platforms and applications, and driving innovation and transformational changes in tooling, processes, and infrastructure. He is passionate about creating compelling information experiences that enable customer success. He has a Bachelor's in Electronics Engineering and a Master's in Business Administration.

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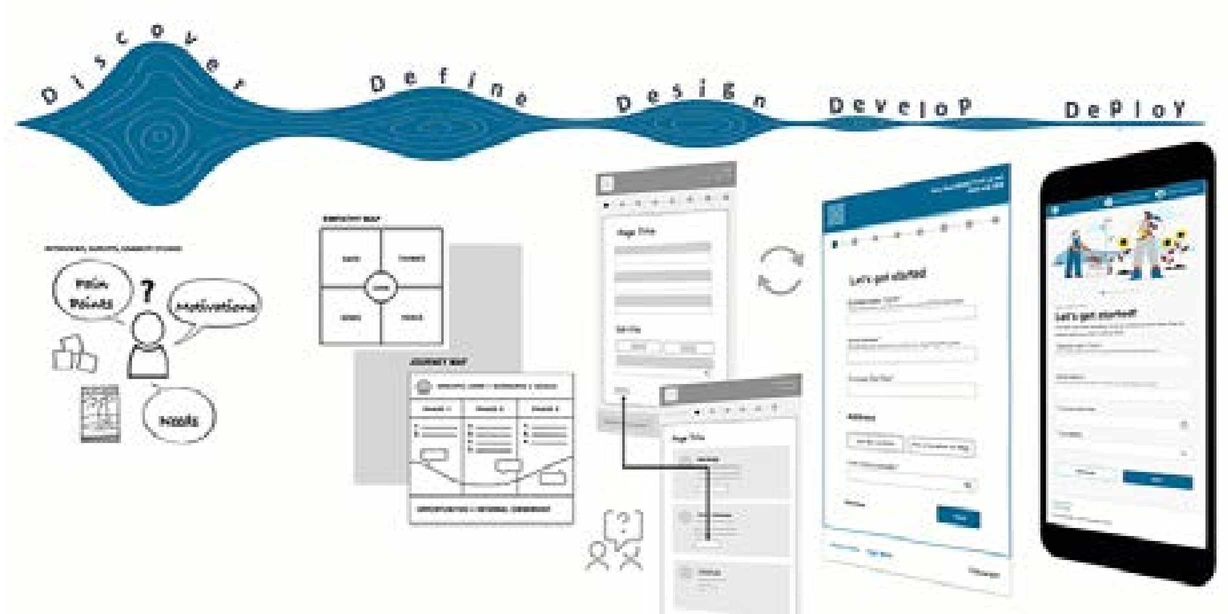


Design thinking is both a mindset and a practice. It can be broken down into the following phases.

Ideation or Discovery: In this phase, we work to uncover and identify the opportunity that we want to address or solve.

Definition: We dig into, via an empathy map or user journey, the persona that we are solving for and try to understand their goals and motivations. We also look at what is out there, or what we call a 360 view, for similar solutions even if they are in different domains.

These first phases are critical, strategically, to ensuring that we are solving the right problem for the targeted persona.

Iterative Design: In this phase, we create a prototype and get feedback from people who represent our identified personas. We use the feedback to iterate on our designs and, along the way, stay aligned with what is feasible.

Development: We create persona-based content and build the required deliverables. Content goes through technical reviews and is audited for conformance with our language and style guidelines.

Deployment: We build and deploy the content solutions for release, either in the application or on the documentation site.

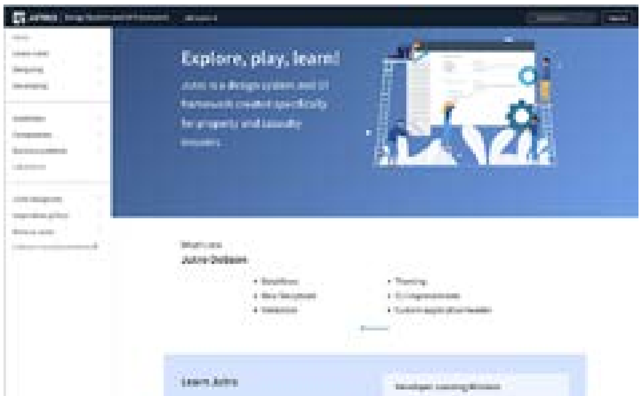
With the design thinking approach, team members are encouraged to experiment, to learn new skills, and to apply these skills in new ways. Real-time analytics, and talking with our end-users, empower us to get direct feedback, reevaluate strategies, and quickly iterate to improve information experiences for our users.

Reimagining how we approach content creation

When we embarked upon this change, we wanted to see what opportunities were available to us to make our users' lives easier. Learning more about our users and their pain points helps us ask the right questions to create targeted solutions. At what stage in the user journey would they need assistance? Are there different types of content or new formats that we might explore? What technologies and information paradigms could we leverage to empower our users? The goals, of course, are to increase learnability, findability, and usability through our toolkit: information architecture, content organization, presentation, and other methods of delivering information.

For example, when we were tasked with creating documentation for Jutro, Guidewire's design system and UI framework for Property and Casualty insurers, we first did user research, conducting interviews with both designers and developers who would use Jutro. Through an iterative design and development process, we decided to create a new documentation microsite for Jutro, which features both designer and developer documentation, as well as tutorial videos for getting up to speed with Jutro. Through feedback we learned that including links to Storybook, which provides detailed implementation assets, was essential.

Jutro microsite landing page. ©Guidewire Software



In addition, we're exploring the use of multimedia, such as embedded microanimations, to see how the combination of text and video aids learnability.

To introduce new UIs and features to our users, we're using a combination of in-app notifications and walk-throughs and provide contextual assistance when and where users need it.

Onboarding new users with in-app walkthroughs. ©Guidewire Software

A large part of our user base is technical, including API developers and DevOps administrators. We strive to create great information experiences for our technical users too, empowering them to efficiently build solutions by providing the content that they need — developer documentation, code samples, tutorials, and of course API references. User feedback plays an important role in helping us to achieve this goal. For example, we recently made our API references and associated documentation public in response to user feedback that we had collected.

We'll be tracking to what extent these, and other enhancements, help our users to consume and understand content.

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Managing change

As we navigate through this transformation, we've realized that change can be hard, but it doesn't have to be. As is typical in most teams, we have our share of early adopters who want to jump in and experiment, and those who would rather wait for fully baked tooling and processes before taking the plunge. And that is perfectly OK. We certainly don't intend to boil the ocean.

One approach that seems to be helping is to introduce change in small digestible chunks in specific and targeted areas. For example, it is easier to introduce onboarding walkthroughs for a new microservice than for a large established product.

This change has expanded the scope of our work and has led to increased specialization within the team—UX writing, information architecture, tools development, technical documentation, and developer documentation— each of which contribute towards creating holistic information experiences for our diverse audiences.

Keeping the fire going

Our newly minted Information Experience team is at an inflection point. Team members are jumping in, learning new skills, and building on existing ones. As a result, innovation is happening quickly, and we are transforming at a rapid pace. As we evolve in this transition, we will continue to grow in our ability to experiment and innovate, offer content in different formats, to be flexible and adaptable to the different ways that people learn, and to push the boundaries of content design.

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

Minimalism: Creating Information People Really Need
September 28 – November 2, 2022: Online Course
https://comtech-serv.com/event/minimalism-9-22/

Editing Essentials for Writers and Editors
September 28 – November 2, 2022: Online Course
https://comtech-serv.com/event/editing-2/

Publishing for DITA
September 29 – December 8, 2022: Online Course
https://comtech-serv.com/event/publishing-dita-9-2022/

LavaCon
October 23 – 26, 2022: New Orleans, Louisiana
https://lavacon.org

tcworld 2022
November 8 – 10, 2022: Stuttgart Germany
https://tcworldconference.tekom.de/

DITA-OT Day
November 13, 2022:
https://www.oxygenxml.com/events/2022/dita-ot_day.html

ConVEx Europe Conference
November 14-15, 2022:
https://convexeurope.infomanagementcenter.com/

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