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Review of a constant: the value of engagement

James Hill, Rocket Software and Severin Foreman, ServiceNow

In the current business climate, engaged employees are considered one of an organization's greatest strengths. While it is rare to find a consensus on anything these days, analysts agree unanimously that engaged employees lead to *achievement of an organization's goals and better business outcomes.*

The interest in engagement can be tracked by the rise in engagement surveys beginning in the early 2000s.[cite] While polling company Gallup set the benchmark with their Q12 engagement survey, many companies now offer surveys purporting to measure employee engagement. Publicly available recent results are remarkably consistent. As little as 10-15% of employees worldwide and 30-35% in the U.S. fall in the 'engaged' category (Gallup), while 57% of US employees are measured to be less than fully engaged after two years in a job. (57%). Notably, engagement levels over the last 10-20 years across all business sectors consistently show no real increase in engagement, the majority of employees falling somewhere in the middle. [Trost].

During this period, interest in engagement has tracked a shift in models of leadership, from top-down models of authority and decision-making to employee-centered models of leadership. Employee-centered leadership approaches employees as valued sources of expertise, while workplaces strive to provide a sense of shared ownership within the organization – of its goals, outcomes, and its challenges. In fact, one of Gallup's most frequently-cited discoveries is that 70% of the variance in team engagement is determined solely by the manager (cite 1; cite 2). We find the results of these two trends striking: though an understanding of the impact of leadership on workplace engagement has increased, surveys show little evidence that engagement is increasing.

In this article, we look critically at the current discussion around engagement and make the case that engagement offers inherent value to an organization. The impetus for this article came from this year's CIDM Best Practices conference, A Seat at the Table, which focused us on themes of inclusivity, relationships, and influence. In particular, this article expands on ideas discussed in one conference presentation "Giving employees a seat at your table". We attempt to answer the following questions. Why is engagement important? What does it mean to have 'engaged' employees? How well can we extrapolate from survey results? And perhaps most importantly, if engagement strongly determines organizational success, what can you do to increase your team's engagement?

WHAT IS ENGAGEMENT?

In our research, we came across many definitions of engagement. Although the definitions vary, they aim at something reasonably similar. Common themes include levels of an employee's cognitive, emotional, and behavioral investment [cite] and discretionary effort toward organizational outcomes [cite]. In the context of an organizational or workplace goal, we found engagement to be a deceptively simple term. For this reason, we treat engagement more like a concept requiring explanation than a word in need of a definition. We hope to provide practical guidance on how to understand engagement and create an engaging workplace.

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From the Director

Dawn Stevens

Out of Africa

I was recently fortunate enough to spend a few days on safari in the Maasai Mara National Reserve, an area of preserved savannah wilderness in southwestern Kenya, along the Tanzanian border. There was no shortage of wildlife sightings, but I discovered that the primary goal of a safari driver is to find the big cats – lions, leopards, and cheetahs. Along the way, you will see all manner of other remarkable creatures, but no safari is complete without daily sightings of the often elusive felines.

We could, and did, spend hours observing elephants, giraffes, zebras, and all sorts of antelope and birds. It took such little effort to find them, however, that our guide seemed almost surprised by our desire to stop and take it in. To be honest, I sort of understand his position. We didn't need his expertise to find the animals that roamed in large herds or that we could see in the distance against the horizon.

I could have saved myself some money and driven myself through the reserve if all I wanted to see was the obvious. However, left to my own devices, I would have driven by many of the highlights of my tour, including not only the big cats, but the newly born Thompson's gazelle that awkwardly took its first leaps and bounds right in front of us, the lion cubs playing in the short grass where they blended in, and the hyenas casually resting under a bush by the side of the road. I frequently wondered why we came to a sudden stop on our tour, only to have my sharp-eyed driver point out a wonder of nature hidden right in front of me.

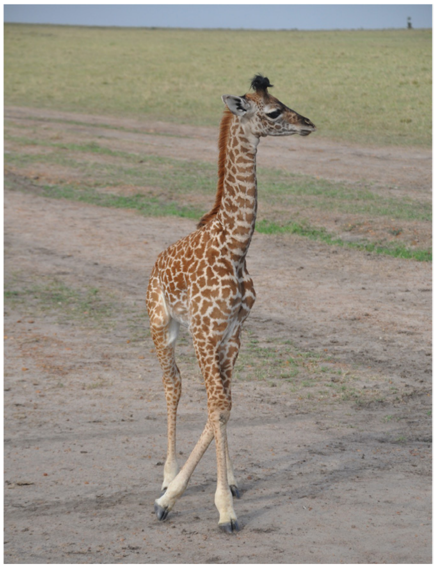
Much harder to find the ones tucked away in the high grass or bushes.

Our driver estimated this baby to be less than 30 minutes old.

The overall success of our safari relied on a network of safari drivers communicating with each other about what animals were where and our driver's specific navigational and driving expertise to get us within just a few feet of these spectacular predators.

While we were carrying a telephoto lens, all of these cats were within 8 feet of us.

It also helped that our drivers listened not only to anything we said to them directly, but the chatter amongst ourselves in the Land Rover. Our drivers observed our delight at the baby animals, and instantaneously everything they found us had a young one with them.



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.

It ultimately occurred to me that our goal as technical communicators is to be the safari driver for our users:

- Understand what are the big ticket and hard-to-find items and help users navigate to them. Users don't need us for things that are easily discovered on their own.

- Listen to what users are asking for. Tap into what they are saying to each other in user forums.

I casually mentioned to our companions that I wanted to see a secretary bird up close.

Next thing I knew…

- Be observant. Provide the details that your users might otherwise miss.

- Give users the information they need, no matter how ugly it might be.

Further, while establishing our position in the wilds of our organization, we would do well to take a few pointers from the animals themselves:

A lion does not flinch at the laughter coming from a hyena.
A leopard is not intimidated by animals that outweigh him.
A cheetah does not race other animals to prove its speed.

I encourage you all to be like the giraffe. Stand tall, aim high, and be spotted!

Kwaheri!

Dawn

Severin Foreman
ServiceNow

Severin Foreman is a Senior Manager of Product Content at ServiceNow. He has over twenty years' experience in technical documentation having worked as a technical writer, DITA solutions engineer, and as a manager. His professional interests include building strong teams, developing tools that promote writer efficiency, and designing processes that streamline operations.

James Hill
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James Hill is an Associate Manager of Information Development at Rocket Software, with a focus on IBM partner products. My work as a technical writer enabled me to immigrate from Vancouver, Canada to Austin, Texas 10 years ago. My professional interest is to understand recent changes to work and the implications for leadership. I hope to write more articles and hear from colleagues.

(continued from page 1)
First, it's important to point out that engagement is subjectively *emotional*. The workplace is not always a psychologically secure place. An engaged employee feels a psychological and emotional connection to an organization's people, its goals, and its challenges. Second, engagement requires that employees are *motivated*, committed to achieving the organization's goals. Specifically, engaged employees are willing to put a level of effort into the organization's goals beyond the bare minimum. Third, engagement involves a qualitative set of *behaviors*, such as productivity or participation, that evidence employee's emotional well-being and commitment to the organization.

During the conference, we took a fun and admittedly unscientific poll that enabled us to discuss which employee qualities matter to the attendees. The results were:

1. Reliable
2. Productive
3. Independent | Flexible

(Note how much importance our attendees attach to being careful. As long as you reliably show up for work and produce, let the ship sink!)

Rather than give you yet another ready-made definition of engagement, we encourage you to find out how your organization defines engagement, consider how you think about engagement, and compare your own ideas to definitions you find. A word of caution: be sure your sources disentangle engagement from other related terms - satisfaction, morale, happiness. [cite]

We also recommend critical discussions of engagement with colleagues in the context of your organization's goals and values. What emotional states does your organization encourage? What behaviors do these goals and values point to, or are important in your organization? How motivating are these goals and behaviors? Try to look past what your company says are its values and look at actual behaviors and which behaviors are rewarded. For example, does your company talk about "work/life balance" but only give recognition to people who pull all-nighters?

When critically assessing behaviors used to describe engaged employees, the behaviors are often usefully contrasted with their opposite. [cite]

Behaviors of engaged and disengaged employees:

Engaged behaviors	Disengaged behaviors
Optimistic	Pessimistic
Team-oriented	Self-centered
Goes above and beyond	High absenteeism
Solution-oriented	Negative attitude
Selfless	Egocentric
Shows a passion for learning	Focuses on monetary worth
Passes along credit but accepts blame	Accepts credit but passes along blame

While defining behaviors across a spectrum is helpful for the sake of discussion, be aware how judgment can be clouded. First, avoid a false dichotomy - overestimating the differences between categorical extremes. More plausibly, emotions and behaviors fluctuate over time while engagement within an organization occurs along a continuum. Second, avoid ascribing traits as natural or fixed characteristics. Because engagement is emotional and behavioral, assume that engagement is a developmental concept, that people are adaptive and want to succeed. The conditions for engagement are not fully in anyone's control. The key here is to understand employees as individuals and find long-term patterns that provide both leaders and employees with learning and coaching opportunities.

Sev says: We have a lot of data that measures the benefits of engagement, but I believe that engagement matters intrinsically in the same way that I believe that diversity, inclusion, and equity (DEI) matters. In fact, I think there's significant overlap between DEI and engagement, and that overlap is about authenticity - behaving in ways that align with your view of yourself and your development. The more authentic you can be at work, the more likely you are to contribute; you're more likely to be engaged. As someone who has enjoyed the privilege of being highly authentic with my colleagues, I want others to enjoy that same benefit as much as they want to.

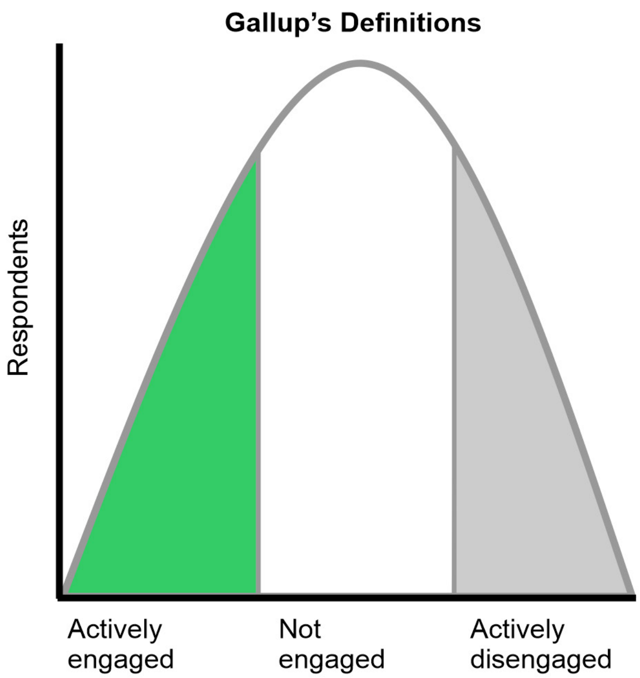
Can leadership increase engagement?

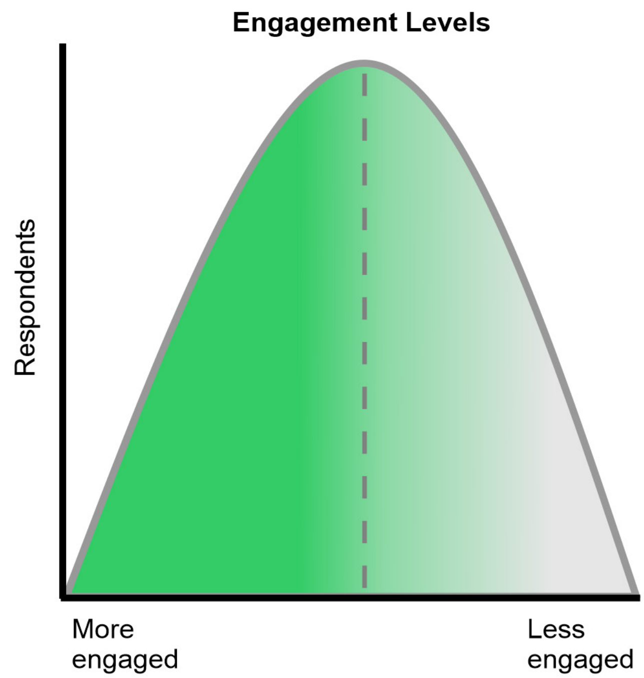
Spoiler alert: though the data says leadership is unlikely to increase engagement, we want to provide a different way to view the data.

Gallup categorizes results from its Q12 survey into three categories of employees: actively engaged, not engaged, actively disengaged. Gallup's widely-cited statistic that 70% of variance in team engagement is determined solely by the manager (cite 1; cite 2) points to the influence of leadership on engagement. Yet Gallup also reports that while 59% of contributors are more likely to be engaged by highly-engaged managers (what Gallup labels the cascade effect [cite]), only 35% of managers are highly-engaged.[cite 1; cite 2]. If the link between engagement and leadership is as strong as Gallup says, these findings present a clear challenge to organizations: can better leadership increase employee engagement?

We should ask a couple of critical questions. First, how well do engagement surveys measure what they purport to measure? Gallup claims their surveys show that engaged employees are relatively rare. Yet the Q12 survey defines only one of three types of employees as engaged. Further, according to one researcher, while survey results show a remarkably consistent bell curve in which the majority are somewhere in the middle, Gallup's three categories ensure that the majority of the bell curve falls outside the engaged category. Are Gallup's categories overlooking important gradations in engagement and skewing surveys toward a negative result?[trost] And if you want to increase engagement, is it a good idea to treat the majority of employees as having no engagement?

In the following diagram, the left bell curve illustrates a typical Gallup survey result: 30-35% are engaged, 65-70% have no engagement. It seems implausible to divide respondents and report survey results this way. The problem is that Gallup's three categories ensure surveys identify only the most engaged employees and designate everyone else as having no engagement. We believe a more constructive representation of the data is shown in the right bell curve. Survey data is likely capturing varying levels of engagement across a spectrum between more or less engaged. A plausible report on survey results should incorporate this variation to help you locate and promote existing levels of engagement.





Second, the onus of engagement cannot fall solely on managers. Employees must take some responsibility for their engagement [cite], and that responsibility must be part of the meaning of engagement. If managers want engaged employees, they must cultivate the trust and security engaged employees require. In that context, employees must expect to offer their expertise, provide constructive criticism, and take some responsibility for results, even during challenging times.[Scott, pp.10,95, Radical Candor] Next, without broader support from the organization, even the best managers cannot expect to succeed in engaging employees. To support engagement, organizations must understand the importance of and promote the equal value of the 'what' – the goals we achieve - and the 'how' – the values, culture, and behaviors through which employees achieve the organization's goals.

One success story

At a previous company, we acquired several new tech writing teams. The result was significant inconsistency across documents produced by each group and no company-wide documentation guidelines. To help make the documentation more consistent, we formed a committee to create a global template. A worthy cause! But we eventually ended up at an impasse caused by competing demands. We needed a decision-making framework, and it turned out to be an excellent opportunity to create engagement.

The solution was to delegate decision making to an individual contributor, who was responsible for collecting all requirements and opinions and rendering a decision that would bind the teams. Though several managers were committee members, delegating decision making authority to an individual contributor really increased the team's engagement in a few ways. Importantly, while the decision maker did their best to collect and organize all requirements and opinions, the teams were likewise very motivated to ensure their requirements and opinions were registered with the decision maker! No doubt this group-wide engagement was driven by the idea that we could not revisit the decision.

After only a week, the decision maker had enough data to announce the template decision at our next committee meeting. I'd like to tell you that we all toasted the template and moved on gracefully. It was evident, however, that many felt some level of dissatisfaction and awkwardness. That's OK, because we also knew that everyone had had the same input and relative success getting their views adopted. Sometimes, increasing engagement is not straightforward, peaceful, or without ambiguity.

James says: Writing this article expanded my view of what a manager's job is. The best managers I've had provided me opportunities to develop beyond my immediate skills. But employee interests vary widely. During research for this article, I found that the best managers cultivate a genuine investment in individual employees and find ways for individuals to succeed in ways unique to them. Instead of looking at how you can shape individuals to meet an organization's goals, perhaps a better approach is to provide individuals the conditions for their success, and achievement of the organization's goals will follow.

What is engagement culture? And how do you get there?

We believe that leaders and organizations can sustain meaningful levels of engagement by cultivating a culture of engagement. A culture of engagement has intrinsic value and produces long-term advantages. The value of engagement is two-way: organizations want to attract and encourage engaged employees to achieve business outcomes and employees gravitate toward organizations with a reputation for an engaging work culture.

Analysts have produced a great deal of evidence that great managers lead to better business outcomes. [cite 1] We agree that managers are strong role models for, and agents of, employee engagement. [cite 1] It is critical that managers encourage patterns of behavior that motivate employees to engage in effective and positive outcomes. Here's our non-inclusive list of behaviors that we recommend for creating a culture of engagement where you work.

- Partner with HR on leadership training. Investing in leaders who promote engagement will have a significant impact. Organizations without a manager development and training program are missing out. One important element of leadership training is how to articulate a vision and align employee actions toward that vision.
- Delegate and empower! Engaged employees directly influence how business gets done. Encourage employees to use their strengths to take on challenges and make decisions, and praise their efforts when they do. If you are invited to a meeting with higher-ups, but cannot attend, consider sending someone to take your seat at the table. Empower them to represent you, answer questions, and to take ownership on behalf of your team.
- Open communication channels that relate directly to engagement. Make your strategy of engagement clear and specific so that your team understands why you are asking questions and promoting discussion. Surveys are one-way communication channels but useful sources of information. [cite 1]. One suggestion we learned at the Best Practices conference was to go on a "listening tour" to gain feedback from customers or stakeholders. Invite others to give opinions on decisions that may not affect them directly. When discussing an employee's work, learn to ask questions that focus on their engagement with work and goals. For example, "How can I help you?" Or, "Where do you see this task on your list of priorities?"
- Invite individuals to contribute in ways that are meaningful to them. Enticing people out of their daily work routine and core duties can help build confidence and trust and let them know they are important. Offer professional development and volunteer initiatives to your team. Look for blind spots and opportunities hidden by generic responses like 'I'm fine.' Let them wear ironic t-shirts.
- Promote psychological safety by encouraging a reasonable degree of risk where possible. Engaged employees want to learn and grow, which means you must be willing to help employees guide mistakes as well as successes and draw lessons to achieve long-term results. This approach is often labeled 'coaching'. When mistakes cause friction with others, leaders must demonstrate support for the employee's efforts and make clear how actions are aimed at helping grow the organization. As a leader, admit your own mistakes and model vulnerability.
- Welcome negative and dissenting opinions. Managers tend to have a bias towards accomplishment, but some people tend towards risk avoidance—attuned to potential risks and how to avoid them. Don't mistake people with dissenting opinions as disengaged. If people are speaking up, they are engaged! Likewise, allow employees to express disengagement, skepticism, criticism, and failure. Creating an environment for safe and open discussion, while easy to acknowledge as valuable, can be especially difficult for managers whose first reaction to criticism is to judge the individual or defend the organization.

Final thoughts

After reviewing recent definitions and frequently cited statistics, we determined that engagement is best understood as a complex concept and pointed to potential pitfalls you'll come across when researching engagement. We found that the link between engagement and leadership is strong and suggested long-term patterns of behavior that personalize employee engagement and sustain a culture of engagement.

We studied the concept of engagement because of recent changes to—and uncertainties in—the workplace. There is increasing evidence that workplaces are moving toward greater support for employees in several ways including, work-life balance; diversity, equity, and inclusion (DEI); a focus on broader employee well-being outside of work; and even a four-day work week. [cite] Organizations will compete for talent on these bases and employees will respond to organizations that attend to them. Despite workplace changes, the demand for and value of engaged employees remains constant.

Creating this article has been a learning journey for us both. We're curious how we'll look back on the ideas expressed here and how our views might change. We hope that the article motivates you to find opportunities to increase engagement for your teams and discuss engagement further with colleagues. If you'd like to contact us with thoughts or questions, we'd love to hear from you and continue the discussion.

Structured Content Reviews by SMEs - Challenges and solutions

Dipo Ajose-Coker, Componize

Why do we review documentation?

After all, it's been written by a professional writer, someone who trained for years to write procedures that work and content that perfectly describes and helps the end user. So why spend extra time performing a formal review of the document?

Technical documentation is a key component of compliance and regulatory requirements, especially in regulated industries. Reviewing the content is a crucial step in the product life cycle, from creation to obsolescence. It ensures that the documentation is accurate, complete, and meets all the necessary requirements for regulatory and compliance purposes. It also ensures that it is written clearly and easy to understand, which will help prevent any potential issues from occurring down the line.

Who reviews technical documentation?

Subject Matter Experts (SME)

A term that covers many actors in an organization. Depending on the reason for review, one or many SMEs may be called on to check the accuracy and compliance of the product documentation.

Peers

Peer reviewers are typically project leaders or fellow technical writers. They typically review documentation for grammatical and style guide accuracy, as well as for structure and conformance with writing principles such as minimalism or simplified/controlled language.

Product engineers, designers, and owners

These actors have full or near-perfect knowledge of the product. They verify that the content fulfills the requirement of being complete and informative. They check whether the documentation covers the latest product information such as screenshots, steps in procedures, part numbers, and other details.

Legal, complaints handling, and marketing departments

The legal department intervenes especially in the case of a new product to ensure that items such as product names do not violate trademarks. If the product uses third-party subsystems, that information must be provided in the documentation, and any proprietary information must also be declared as such. The marketing department typically makes suggestions or takes content from the product documentation to build marketing materials or product datasheets.

Risk analysis & corrective and preventive actions (CAPA) leaders

Risk analysis is carried out on all products that have a potential to cause harm, directly or indirectly. Where risks cannot be mitigated by design, they are mitigated by documentation. A risk analysis leader will review a document to ensure that all risks in the Cause/Mitigation database are matched to a safety notification or information in the documentation. A CAPA leader will typically review documentation when investigating the root cause of an issue that has occurred in the field.

Regulatory Affairs and Certification leaders

These are the principal SMEs when it comes to product documentation in regulated industries. Here the product must provide a minimum level of information about the use and maintenance of the product. If the product is subject to standards, the Regulatory Authority will require that the documentation contains information required to prove that it meets minimum standards required for that product. In the case of product certification, the documentation provides some of the information required by those standards.

What are some of the challenges?

Convoluted documentation review workflows

Most of the issues we face, I can quite honestly state that we inflict on ourselves. We created workflows, but rather than finding the simplest one to follow, we make them increasingly complicated, sometimes in good faith.

An example of an overly complex workflow

Quite often the document review workflow looks like this. In this document review workflow, 5 tools and many processes compete for attention.

Dipo Ajose-Coker
Componize

With over 16 years combining languages and IT as a technical writer and editor working in regulated industries (high-end medical devices and finance), Dipo blends his experience of authoring in structured and unstructured environments; migrating technical publications to DITA; and content strategy to help develop a best-in-class CCMS. Dipo holds an MA in Multimedia and Multilingual Document Design.

- Requirements Database – IBM DOORS for example, but also anything used to store requirements, JIRA, Excel, etc.
- EDMS – Electronic Document Management Systems for document and records management. Sometimes used during review to track approvals.
- CCMS – Component Content Management System. Componize DITA CCMS for example.
- Document share systems/platforms – Network/Cloud storage solution. Often used to distribute drafts for review. Also includes emails, SharePoint, and instant messaging in this category.
- Delivery Platform – The final destination from where the intended audience is supposed to access documentation.

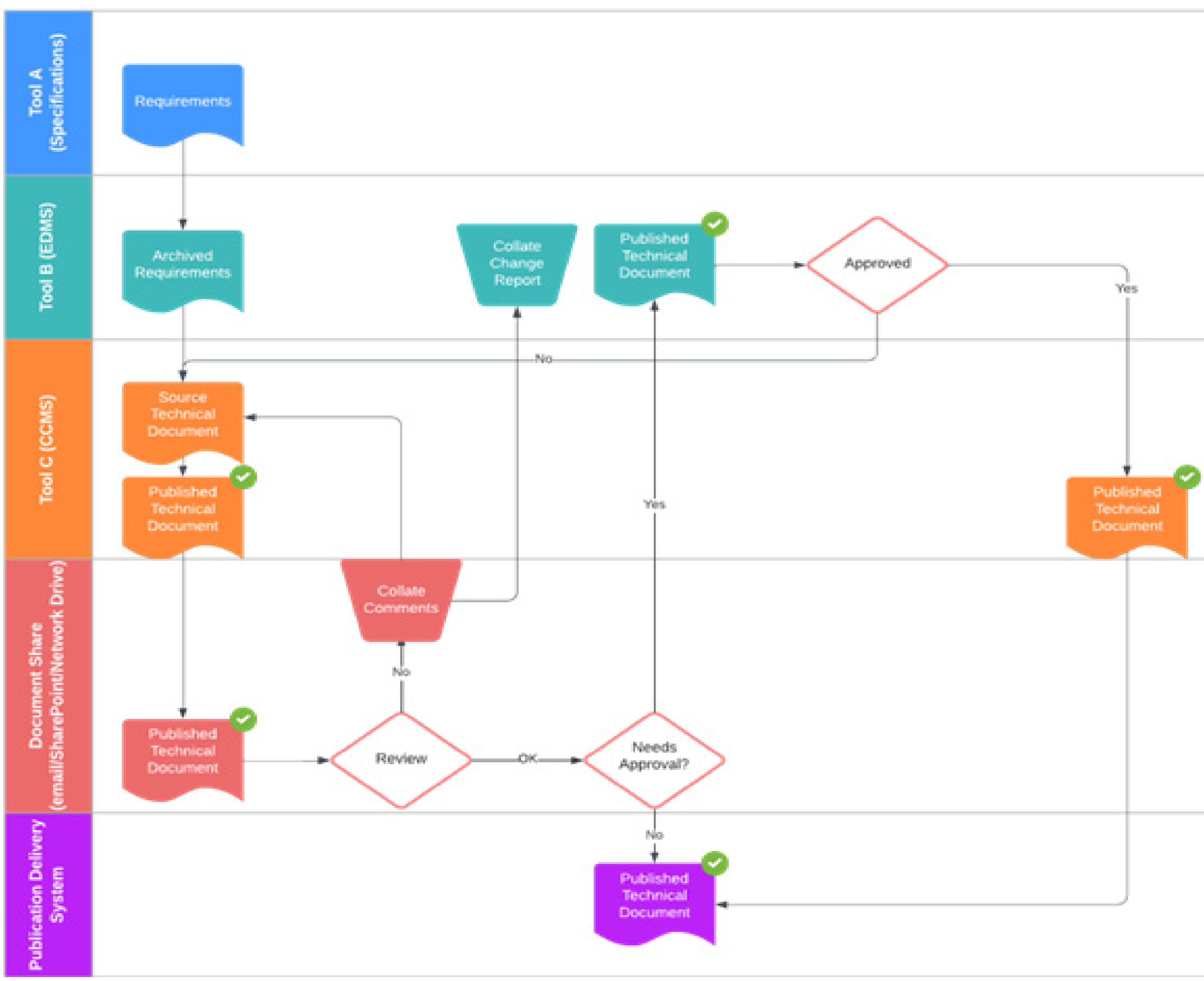
What's the issue? Too many tools, sometimes overlapping in duty, and swimming from lane to lane.

Lack of collaboration/increase in silos

We have the tools and technology to collaborate especially in this "relatively new" world of remote working. However, we continue increasing the spaces between us and creating Silos. This is either out of self-preservation or a misguided approach to working practices, some managers think their teams work better isolated from the rest of the structure in order to keep concentrated on their tasks.

Silos within an organization lead to conflicting schedules and priorities.
The SME might not be in the same headspace as the technical writer due not just to their task prioritization, but also due to the multiple systems and tools in use within the organization.

There is also a multiplicity of role-unique tools.
As seen in the complex workflow presented earlier, each role within the organization can have one or more tools used to perform their tasks. The transfer from one tool to the other or the time it takes to wrap our brains around how the other tool works can lead to incompressible delays in workflows.



Lack of SME engagement in reviews

When asked, many SMEs will admit that they consider document reviews as a peripheral part of their job. Unless reviewing documentation is listed as a core task, some consider it an inconvenience. They would go as far as to suggest that if they must review the "content", they might as well write it themselves. If reviews are not explicit in the list of SME tasks, many will consider it a low priority aspect of their job.
There are other aspects to consider as to why SMEs are reluctant to review content

Learning curve for the non-technical reviewer

There is a lack of adequate tools to review XML source content, and for the few that exist, they require SME training. No matter the XML editor, we as technical writers must admit it takes getting used to. Training someone to use a tool that they will not use for another year is a waste of time. Think about your learning curve when you first encountered Adobe FrameMaker: How many of the functions can you honestly say you fully understand and remember how to use? How do you expect someone who uses it infrequently to hop into the tool to do something they are not necessarily in the mood to do?
So, we have now come to the point where you need training in order to use the review part of your CCMS before being able to review a document. That learning curve is too dear for an SME to make the investment. "For a few hours of work, I have got to go through a few days of training? No thanks, send me the PDF please!"

Some challenges are specific to structured content

Complexity of reuse and a lack of adequate tools

The reuse process is complex. It requires a deep understanding of the content strategy and the information architecture that has been designed to support it.

The challenge is not just the technical requirements of reuse, but also the cultural shift that is required to get people to think differently about content. It requires a change in mindset so that all stakeholders see their role as contributing to a common goal of reusable content. In addition, there are risks that need to be managed throughout the process (e.g., regulatory compliance issues, intellectual property risks)

A simple no-tags view of an XML document is not a solution.

- Reviewing structured content in XML requires training

- There is a cost in time and money training an SME to use an XML editor for just 5 days a year

- The content is exposed to a risk of introducing visible and invisible defects, for example:
  - Hard coding content that should be a conref, key or variable
  - Copy/paste of content as opposed to using the correct reuse mechanism

Mistrust of source content reviews

An example of overcomplicating things is an insistence on PDF reviews as opposed to reviewing the source content in the CCMS. Some of this is based on a misinterpretation of an FDA requirement that information provided in submitted documents must be in a format that cannot be easily changed or modified without an appropriate level of traceability. This is interpreted to mean PDF or, in the past, paper documents are the only acceptable formats. A long time ago, paper and PDFs were quite difficult to falsify. Paper left traces, as did a PDF. This "truth" is no longer valid. My last search for free pdf editor resulted in over 1.3 million hits. From which you can find at least 10 good multi-platform apps that will do a good job of allowing you to modify a secure PDF Document.

So if these formats are no longer as secure as they used to be, why continue adding a step to the review workflow that forces documentation teams to publish and extract PDFs, place them in a separate EDMS for the approval of the contents before submission? Why not just trust the version and permission controls included in any half-decent CCMS to approve the content and only take that final version out for submission.

How many organizations review source content in their CCMS?

A Componize survey of over a 130 CCMS users in 2020 revealed the following statistics. Organizations have invested (sometimes significant amounts of money) in a CCMS,

however they are not using the full potential of their system, at least or not all the time when it comes to reviewing source content. After having invested so much in a high-end system, they've reverted to the comfortable PDF review of the 20th century!

Time Wasted in Final Output Reviews

- Identifying and highlighting changes in the output document
- Publishing and exporting the PDF from CCMS
- Uploading to a shared drive/attaching to email
- Collating feedback and comments
- Creating and maintaining tracker documents

A change request involves identifying changes and the impact on the product and its documentation, performing risk assessments, and reporting. Poor document control leads to frustrating and often frantic sessions where documentation and engineering teams try to piece together the modifications that were made to a product and its documentation.

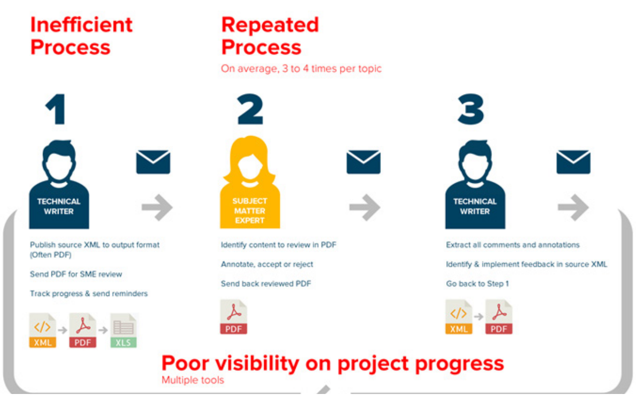
Organizations must be able to demonstrate that content is **secure from unintentional modification.**

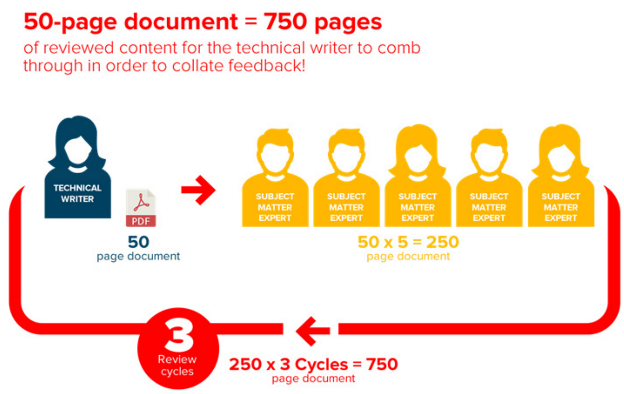
How can we improve the review process?

Analyze and improve workflows

Do you remember the workflow from earlier? Well this one is a slimmed down version. Take out redundant tools and systems. Rather than extracting your document from the CCMS, why not use it, the CCMS, to send the content for

Inefficacy of PDF Reviews





Challenges specific to regulated industries

Compliance

Technical documentation compliance risk is a challenge that many companies face, especially in the regulated industries. Complexity of the CCMS and its integration with the Quality Management System of the organization. However, studies have shown that when correctly implemented within the organization's QMS, the organization is less susceptible to risks arising out of incorrect, outdated, or unclear content and documentation.

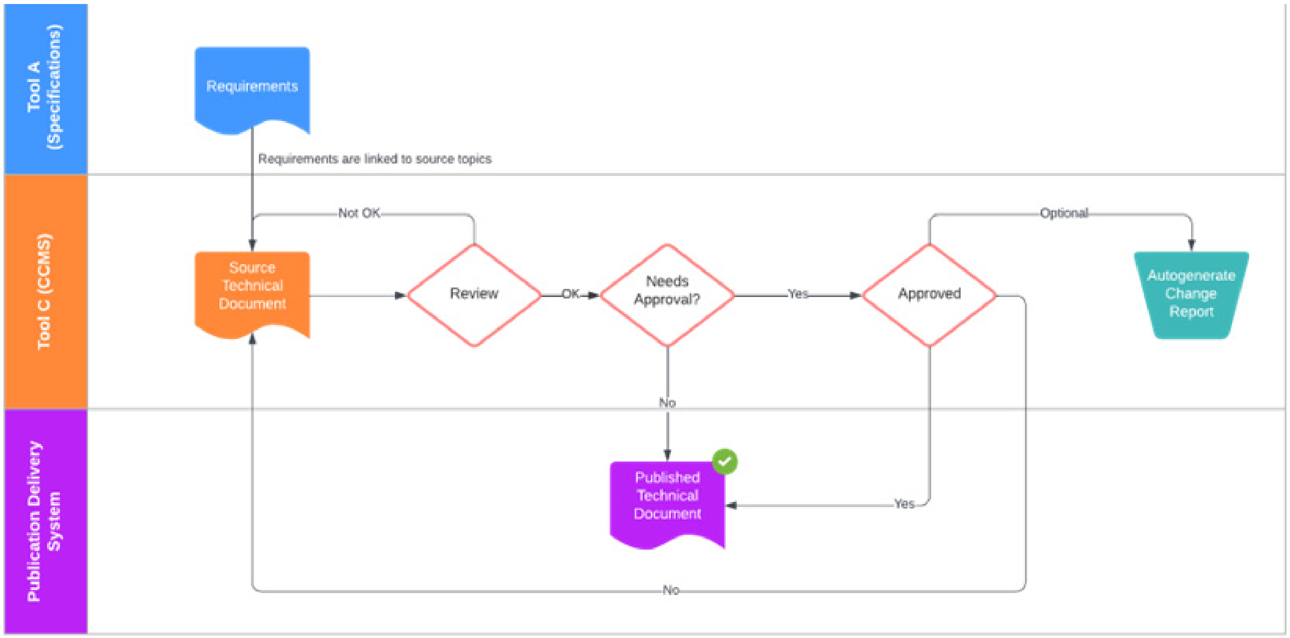
Change Management

In the Life Sciences industry, manufacturers must adhere to requirements governing the design history of registered devices. Making changes, verifying, and validating them, is anything but fast. It involves multiple people and stretches across multiple functions.

review, even if you insist on reviewing a PDF. Some CCMS have a document management function that is able to provide governance services and records management. These features can easily replace the EDMS and Document-Share swim lanes present in the previous workflow.

Connect CCMS & Planning tools

Linking review tasks directly to topics/maps during project planning will allow you to track progress more accurately, have a better analysis of impacts on other parts of the documentation or even the product. A link between both systems can generate auto-notifications if/when there is a change in specifications, triggering an instant notification of content creation and review tasks. Most importantly, a principal advantage is that this keeps the documentation team visible during the planning phase as opposed to during sprint execution.



Content as a Service. Avoid seeking to cram every content type into a single system. Instead, connect disparate systems where needed, so each content group keeps their unique workflow.

Use CCMS Workflows

If you have a connected system, then why not use the workflow tools available in each. If you use your CCMS workflows, then there is less chance of missing someone or something out during the approval cycle. Once the workflow is set up, the advantage is that is can be used by all, thereby standardizing the review process across writers/departments. The CCMS is able to track all changes to content, but also, who said what, when and why, and the resolution actions that were taken. Your workflow can set permissions so that right person receives the right instructions and is only allowed to perform the tasks assigned to them. Can you imagine your workflow automatically creating a "For Review" branch as soon as you send a document for formal verification review? Writers can keep working seamlessly on the trunk content, safe in the knowledge that the content under review will not be inadvertently changed.

Improve Output Format Reviews

- Share in advance to set expectations, identify problems, and clarify goals. Before starting the review process, sharing drafts and thoughts on the content with

- the reviewers in advance allows them to have a clear understanding of what they will be reviewing and what the expectations are for the review. This also gives them a chance to identify any potential problems, disagreements or issues so they can be addressed before the formal review process begins. By clarifying the goals of the review, the reviewers can focus their feedback on the key areas they have been assigned.

- Seek feedback from SMEs before requesting reviews. By seeking feedback before requesting reviews, you can reduce the number of review cycles and increase agreement on the quality of the work. SMEs can provide valuable insights and feedback that can help improve the quality of the content before the actual review process starts.

- Establish review rules to eliminate confusion. Establishing clear review rules can help eliminate confusion, ensuring that everyone involved in the review process is on the same page. This includes setting deadlines for the review and the format of the feedback you need. You can also agree on the process for resolving any conflicts or disagreements that may arise during the review process.

- Engage with your SME during the review process. During the review process, it is important to engage with SMEs to better understand their feedback comments and to clarify questions or contradictions you may have. This can help ensure that the feedback is interpreted correctly and that any issues or concerns are addressed in a timely and effective manner.

- Educate all actors involved in the review process.Education is crucial to the success of the review process. This involves training and educating everyone involved in the review process on the expectations, rules, and goals of the review process. By ensuring that everyone has a clear understanding of the review process, it can help improve the overall quality of the work and reduce the number of review cycles.

Adopt synchronous reviews

- To foster real-time communication between SMEs

- To reduce conflicting feedback

- To reduce time spent collating feedback

There is a time and a place for everything.
While there is this great debate going on about synchronous versus asynchronous working, there is no one solution to all situations.
Sometimes it is best to clarify contradicting feedback with the multiple SMEs involved. For example, a request from the marketing department to include some information might need to be rewritten on feedback from the Regulatory department. The added weight of the counterargument coming from the regulatory leader rather than the technical writer might convince the marketing leader requesting the change.

Limit output reviews

Stop wasting time! Save the final target output review till last. Instead of 750 pages of content to review all at once, the SME only sees that final version once, at the end of the draft cycle. They have already seen the bits of new or modified content and have pre-approved it. The SME then just has to approve the final presentation of the complete publication during the final review cycle. Your CCMS can provide a change report of all the topics that have changed version since the last approval if the SME needs confirmation that nothing else has changed.

Use publication parameters to automatically highlight what has changed, with varying degrees of granularity.

Review Incrementally

Instead of reviewing the entire document at once, it is often more efficient to review the content incrementally based on topics. This allows the reviewer to focus on one specific area at a time, which can help to reduce the amount of time and effort required to review the content. It also makes it easier to identify any issues or concerns in a specific area of the document.

Use your CCMS to track changes

All CCMS allow you to track changes made to the content and easily identify what has been changed or updated. Use this feature combined with the next point to streamline the review process and make it more efficient.

Ensure that changes to content are easily identifiable

When making changes to content, it is important to ensure that they are easily identifiable. When setting up your CCMS publication pipelines, ensure you also create a parameter to automatically highlight changes in content from one version to the other. This helps to reduce confusion and can speed up the review process.

Include technical documentation teams in agile planning

By including technical documentation teams in the agile planning process, the documentation is integrated into the overall project plan and is not an afterthought. Review tasks can then be included in the sprint, and assigned to the relevant SMEs.

- Create task-based reviews

Start creating task-based reviews

This subject could easily be an entire article.

Once integrated in the agile planning, creating task-based reviews allow you to break down the review process into smaller, more manageable tasks. Assign specific tasks to reviewers to ensure that each task is completed as any other task would be in the sprint. This helps to streamline the review process and make it more efficient.

When creating a review task, it is unhelpful to send the same review message to all SMEs every time you need a review. The reason and target of the review should be clear to each reviewer.

A task-based review takes into account the state the document is in, (first draft, formal review, values review) and the role assigned to the review (peer review = style guide, grammar, Certification Review = check that I have not left out important information required to achieve certification, but you can ignore typos).

Conclusion

After having spent considerable sums investing in a CCMS, organizations are still not reaping the full benefit of such robust systems. The ROI can be improved considerably by implementing some or all these strategies. Organizations can improve on the time and effort spent reviewing technical documentation.

Read more on how you can improve the different aspects of technical documentation reviews on the Componize blog

CIDM Localization Member Benchmark Survey 2022

Dana Aubin, Comtech Services

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The 2022 Center for Information-Development Management (CIDM) Member Survey explored trends in localization practices in our community. Before we share the results, we need to define some key terms used in the study.

- Translation–Turning content of one language into another language, for example, English into French
- Localization–Adapting content (language) to fit a specific market or country and adjusting it to accommodate the linguistic, cultural, political, and legal differences
- Localization service provider (LSP)–An individual or company that offers professional translation and localization services

Translation and localization are often used interchangeably, possibly because there can be some overlap between the two. Companies may translate some publications while localizing other components within the publication if not the entire publication. Also, content can be localized without being translated. For example, source content written for a US audience may be localized for a UK audience with different spelling, grammar, and punctuation, and examples, without requiring translation.

Translation and localization are sometimes written as T9N (translation) and L10N (localization) to shorten the terms.

With all results from the survey, we must keep in mind that these are trends, not exact measurements. Some survey respondents have information about translation and localization across the enterprise while others noted that visibility only into their business unit or department. With that said, these trends give good insight into what is going on across industries.

Who were our respondents

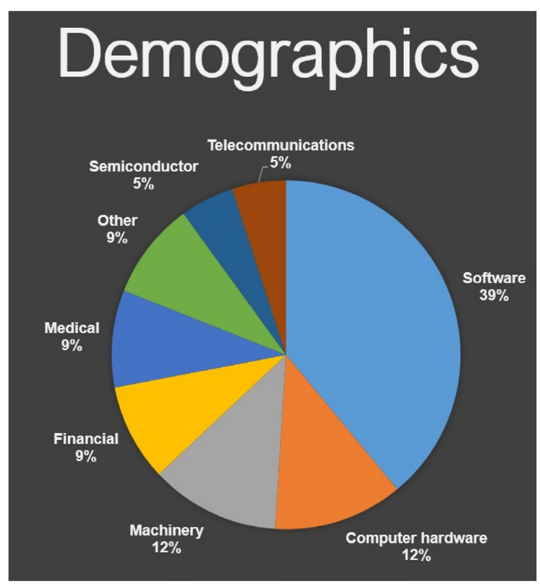
CIDM membership spans countries and industries, and this fact was reflected in the survey results. The largest group of survey respondents were in the software industry (39%), which corresponds with the proportions of CIDM membership.

Other industries included:

- Computer hardware and Machinery 12% each
- Financial and Medical 9% each
- Semiconductor and Telecommunications 5% each

Of the companies that were represented, most of the companies (93%) provide products and services worldwide with an emphasis in North

America. Probably not surprisingly, most companies with a global reach translate or localize content (84%). However, of the companies that don't translate or localize (16%), more than half of those companies have a global market; the others are North America only (7%).



Respondents reported that the reasons they translate are equally to be competitive, regulatory requirements, and a perceived need. Other reasons include customer safety, marketing, and customer requirements.

Why some companies don't translate or localize

Although most survey respondents translate or localize content (84%), some companies choose not to even though they have a global reach (<8%) and have no plans to do so in the future. The main reason reported was that there is no regulatory requirement (57%). This finding was not surprising because for some industries, such as aviation, the expectation is that all users have proficiency in English, so all content is distributed is English.

Another reason reported was that customers aren't demanding translated or localized content (43%). Lack of customer demand does not necessarily mean that customers don't need it, so customer research may be helpful to accurately assess the need.

Other reasons that companies don't translate or localize content were lack of personnel or funding for translation services. Interestingly, these internal barriers almost directly correspond to the percentage of respondents who said they plan to start translating or localizing content.

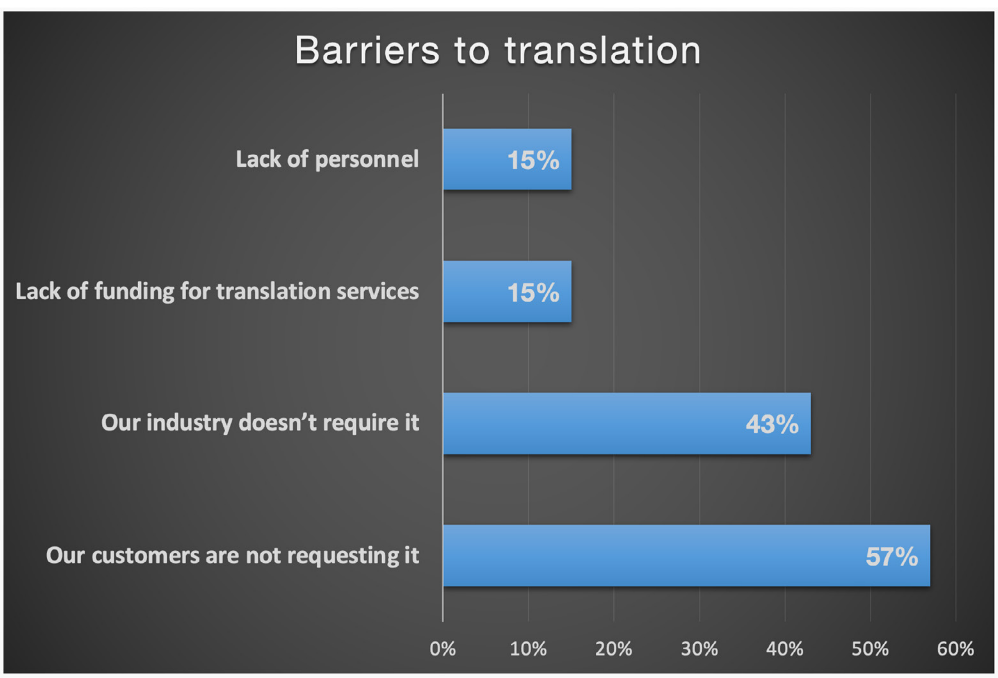
Many companies that do not translate or localize content still incorporate writing best practices in their source content that help all readers, regardless of whether the content is translated or localized. Over 70% follow minimalism principles, almost 30% use Simplified Technical English (STE) or Plain Language guidelines, and some use images or animations instead or addition to text.

Writing best practices that help with untranslated or unlocalized content

- ***Minimalism (71%)***
- ***Simplified Technical English (STE) or Plain Language guidelines (29%)***
- ***Images instead of words (14%)***

No respondents reported using readability measures (such as Flesch-Kincaid).

The rest of the survey findings focus on the companies that translate and localize content.

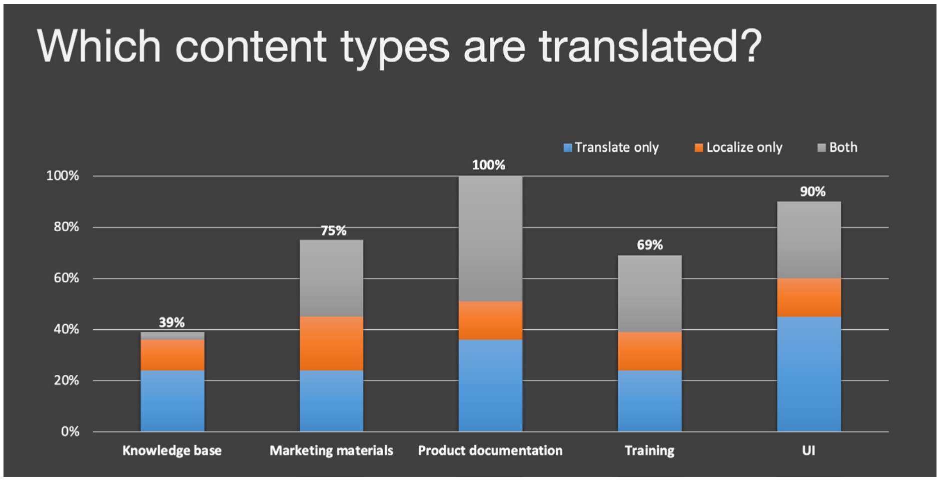


WHAT CONTENT DO COMPANIES TRANSLATE OR LOCALIZE

Not surprisingly, product documentation was reported to be 100% translated or localized by companies that do any translation or localization although localization efforts lag behind translation. The high percentage of translation may be misleading though because it is not clear what percentage of total content is translated—just because 85% of companies translate some product documentation, it does not mean that 85% of product documentation is translated.

The low numbers for metadata and taxonomy matched our expectations as the lowest based on our experience with clients and observations of the tech pubs industry.

The findability (or lack thereof) of content is a common concern of clients who come to Comtech for consulting and an issue noted frequently in usability studies conducted on English content. If users have a difficult time finding content when it is published in the source language, how much more difficult must it be for users to find content in target languages?



Along with product documentation, user interfaces (90%) lead the types of content that are translated or localized, so companies that translate or localize their UIs are also providing product documentation in the corresponding language. Marketing materials and training content follow with 75% and 69% translated or localized, respectively. Of the content types included in our survey, knowledge base content was at the bottom of the list at 39%. The lower percentage of knowledge base may be influenced by whether the content is accessed by the support team or customers.

> ***"KB is coming - but a new area for the company as support has historically been in English only"***

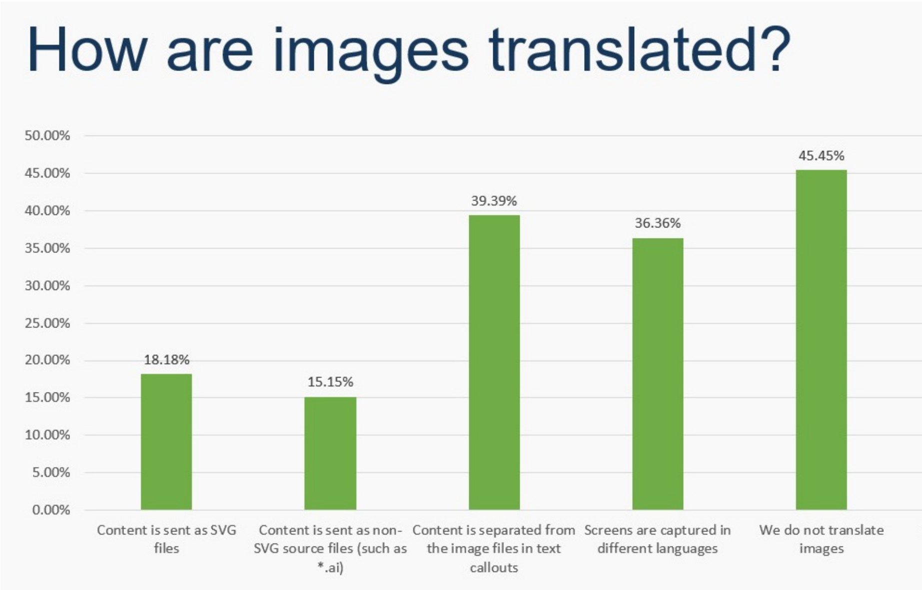
Regarding content components, 100% of text is translated, localized, or both by all companies that translate. About 60% translate or localize audio and video, and around 50% translate or localize alt text, examples, and images. Metadata and taxonomy are the least translated of the items with about 30% reporting that they translate or localize it.

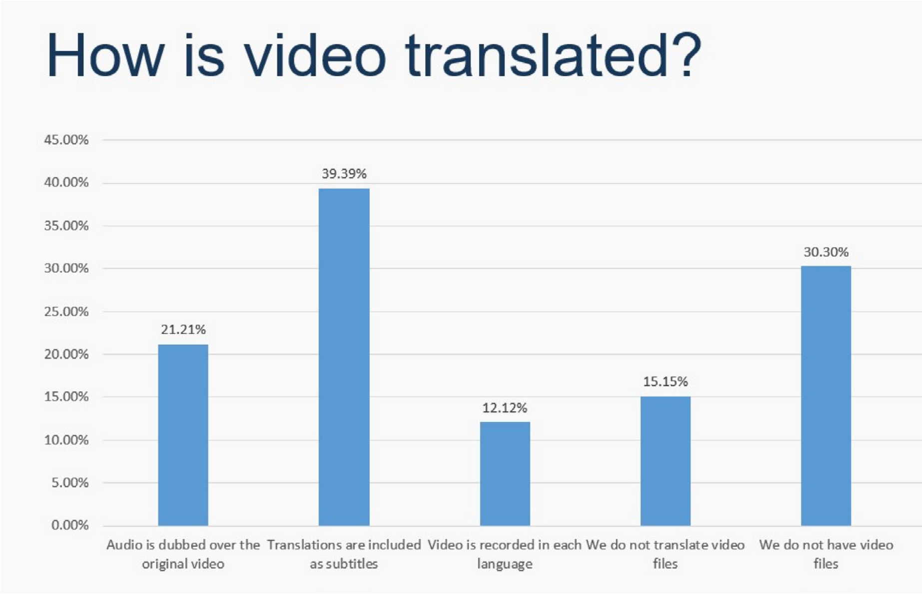
Because alt text is used by search engines for search relevance, the number is not as high as one might expect. The reason may be that almost half respondents reported that they don't pay attention to search engine relevance for translated content.

When it comes to findability of translated content, some respondents are making efforts to improve search engine relevance by localizing the URLs for each language locale or country (36%) in addition to translating alt text. A few are also researching the search engines used in the country (13%) to ensure that appropriate considerations are made.

About 45% of respondents reported that their companies don't translate images. Of the companies that do, almost 40% put the text in callouts so that the image does not need translation, which is a best practice. About 36% capture screens in different languages. Less than 20% send image files for translation as SVG or source files so that the text can be translated.

Respondents also shared that 30% of them don't include videos in the documentation. For videos, our understanding is that users prefer to hear the audio in their own language with subtitles as their second choice over dubbed audio. However, only 12% of companies record videos in multiple languages. By far, subtitles are the preferred method for providing translation on video at 39% compared to the 12% that use dubbing. Only 15% of respondents that include video files do not provide translation of some sort. Although we didn't ask for a reason in this survey, we know that video can be time consuming to create and maintain even in one language and might be an aspirational addition to the technical documentation rather than a necessity.





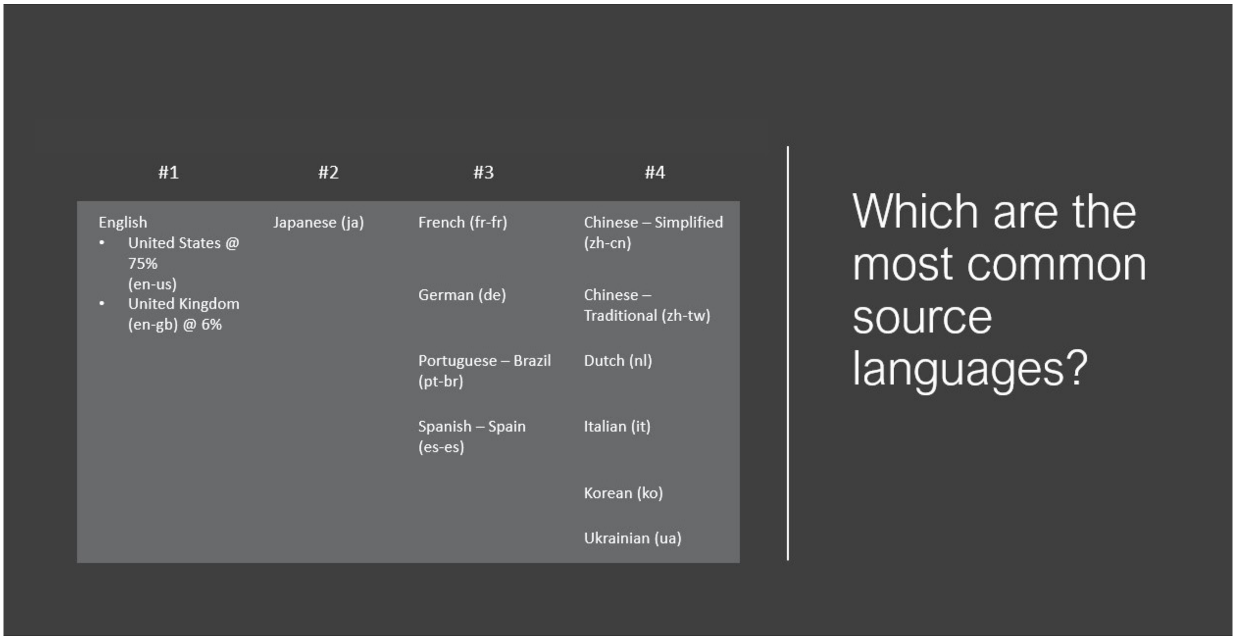
Which source and target languages

Companies make the determination about the languages into which to translate by weighing the following factors:

- Cost/budget
- Regulatory and country requirements (whether English is accepted)
- Market for products and services
- Audience for document type
- Ability to manage the volume, including maintenance
- Requests from the field or directly from customers

Number of languages

For content components, we asked in to how many languages respondents translate. A significant portion of the respondents translate into less than 10 languages, but most translate into between 10 and 20 languages with 19 the average number. A few respondents translate into more than 40 languages. Often what we've found in customer studies is that although the content is provided in a user's language, they use the content provided in the source language, English, if they have some fluency. This fact may go back to the findability of the content in the user's preferred language.



One respondent commented that they translate, "Close to a 100% of product documentation is translated into other languages, however, in a few cases the target markets might be limited so translation is not needed"

Source languages

As expected, English is, by far, the most common source language at 81% for all variants used. In our experience, most global companies write source content in English regardless of their location. However, we were surprised by the second most common source language – Japanese. We expected to see Chinese (Simplified and Traditional) in second place based on our knowledge of companies that write content in Chinese and then use English as a pivot language, but Chinese was one of the fourth most common variants.

The other languages reported as source languages were a small percentage, but it is interesting to note that the companies surveyed most likely have offices in countries where these languages are natively spoken.

Target languages

The top 10 languages into which content is translated match the source languages reported by survey respondents except for Russian and Polish, which weren't source languages. The offices and market for the products and services in those languages are most likely in countries that speak those languages, so the company's strategy is to hire writers who author in that language.

Top 10 target languages*

1. Chinese – Simplified (zh-cn)* 85%
2. French (fr-fr)* 79%
3. Japanese (ja)* 79%
4. German (de)* 73%
5. Russian (ru) 70%
6. Spanish – Spain (es-es)* 70%
7. Italian (it)* 67%
8. Portuguese – Brazil (pt-br)* 67%
9. Korean (ko)* 64%
10. Dutch (nl)* and Polish (pl) (tie) 58%

* Also a source language

The major European and Asian languages were all reported as target languages, a trend that we don't expect to change. One respondent commented that translation into Russia has been reduced because they are no longer selling products or services there due to the war in Ukraine. Other companies may have made the same choice but the extent to which this war is impacting translation at other companies is unknown.

Regarding pivot languages, no significant findings were discovered other than some companies in our survey use pivot languages to translate from a source language to an intermediate language (a pivot) to a target language. Pivot languages are used because of the availability of translators who can translate directly from the source language to the target language.

Variants

In our survey, we included a long list of ISO languages and country codes to determine the most common variants for translation. Spanish was by far the language with the most variants (13), with the top four being Spain, Mexico, Argentina, and Colombia.

Of interest was that eight English variants were reported, which we infer means that companies are localizing US English into other variants. Also of interest is that the Brazil variant of Portuguese is more popular than European Portuguese. Our understanding is that this difference is because the Brazilian market is larger than the Portuguese market.

Most common variants
13 Spanish
Spanish – Spain (es-es) 70%
Spanish – Mexico (es-mx) 52%
Spanish – Argentina (es-ar) 12%
Spanish – Colombia (es-co) 9%
8 English
English – United Kingdom (en-gb) 18%
English – Australia (en-au) 9%
English – Canada (en-ca) 9%
4 French
French (fr-fr) – 79%
French - Canada (fr-ca) – 55%
3 German
German (de) – 73%
2 Chinese
Chinese – Simplified (zh-cn) 85%
Chinese – Traditional (zh-tw) 48%
2 Portuguese
Portuguese – Brazil (pt-br) 67%
Portuguese – Portugal (pt-pt) 42%

What is the volume and cost

The volume and cost of content translated per year can be difficult numbers to calculate by respondents and compare by CIDM because of numerous factors:

- Another team manages translation
- No visibility into translation volume or cost outside team
- Multiple translation vendors used
- Difficult to get an exact word count or page count
- Human translation vs. machine translation
- Survey responses include just user doc, but others include all enterprise content, other doc, UI, e-learning, webinars

The volume of content widely varied among respondents due to factors such as the size of the company, the number of products, and the markets. We normalized answers to our question about translation volume by equating 250 words to one page, which is the industry standard. This conversion was needed because some companies measure translation volume by page rather than word count.

The high end was 400 to 700 million words translated per year, and the low end was 6,000 words per year. This put the mean (average) at 45 million and the median at 1.25 million. The most frequently reported volume per year was one million followed by 50,000.

Translation volume per year*
High 4-7M words
Low 6K words
Mean (Average) 45M
Median (Middle) 1.25M
Mode (Most frequent) 1M (50K next most frequent)
* Page # normalized using 1 page = 250 words

Most companies expect translation volume to stay the same or grow, either by increasing the number of languages (45%) or the volume for the current languages (39%). Only a few companies expect to reduce the number of languages (3%) or volume or number of languages (9%).

Future plans for translation
27% No change
45% Increase # of languages
39% Increase volume for current languages
3% Reduce number of languages
9% Reduce volume for current languages

Regarding the amount companies spend on translation, almost half of the respondents didn't know how much is spent. This response may be because the survey didn't reach the person who handles the budget or translation is handled by another group. Among those who provided a number, the amount ranged from under $25K to over $5M. The amount spent on translation didn't directly correspond to translation volume, but it gives an idea of the translation budget for companies.

How much do companies spend on translation yearly?
>$25K, 6%
$25K–$99K, 9%
$100K–$490K, 18%
$500K–$990K, 3%
$1M–$4.9M, 9%
<$5M, 6%
Unknown, 49%

Given the amount companies spend on translation and localization, we wanted to know whether the cost influences the way content is written. We commonly hear from clients that they would like to be more minimalist or change their approach to reuse, but they can't change the content because it would require retranslation—the decisions to improve the content are based on translation cost. We wanted to find out if that was a trend for others. About 40% of members responded that they make changes without considering the translation impact. However, another 30% save updates for major releases when other content changes are needed, and 30% only modify content for technical accuracy, ignoring opportunities to improve content in other ways.

"Depends on the situation - we address/correct errors as they are discovered. If there is a major overhaul required, we present a business case to get approval from the finance team."

How translation is managed

We asked how translation is managed within the company. For almost 60% of companies surveyed, business units manage their own translations. Half of those business units must choose from an approved corporate list, but the other half can choose any vendor. About a quarter of companies have a centralized translation department that manages translation. For 12%, a centralized documentation team manages the translation.

Although companies use multiple methods to translate content, almost all use a professional, certified LSP to translate at least some of their documentation. Machine translation is a popular method with a preference for post-editing by a human rather than straight machine translation. About a third of companies are doing machine translation without post-editing. Less than a third of companies use an employee who is a native speaker of the target language to translate content, but those employees are often used for translation reviews. A small percentage of companies have an internal translation department.

Most companies use multiple LSPs. Only 10% of respondents use one LSP. Cost and workload are factors, but it is a best practice to use multiple LSPs for risk management and because LSPs specialize in different languages. A company may also use multiple LSPs as a legacy of mergers and acquisitions.

Beyond translating content, CIDM members reported that their LSPs perform many additional services such as:

- Create and maintain translation glossary, 52%
- Provide advice about writing for translation, terminology, taxonomy, and information model, 48%
- Translate strings in maps, 45%
- Properly place DITA tags (such as keys) as needed, 42%
- Translate topic metadata, 32%
- Translate attributes, 26%
- Check compliance with DTD (will it publish), 19%

Who translates your product documentation?

A professional, certified LSP	90%
Machine translation with human post-edit	58%
Machine translation (no post-edits)	35%
An employee who is a native speaker of the target language or a regional office	29%
An internal localization department	6%

# of LSPs used	
1	10%
2	14%
3	48%
4	10%
5	4%
6	4%

These translation functions highlight that you're an LSP may be able to provide value in addition to just content translation. One respondent shared their recommendation about working with an LSP, which we strongly agree with: "I would encourage everyone to develop a good working relationship with your service providers, it helps ease the common headaches associated with translation when communication flows freely between parties."

Although we didn't ask directly whether respondents use DITA, we know from other responses that 61% are sending DITA files for translation. Therefore, we were surprised by the low percentage of LSPs that validate the translated content against the DITA DTDs to ensure that the content can be published.

The number of LSPs that translate topic metadata is similar to the number of companies that translate taxonomy and metadata, so it's likely that the company hasn't requested that those values are translated, not that the LSP couldn't provide that service. Also with DITA 2.0, some attributes that had content in DITA 1.3, such as @navtitle and @alt, will be deprecated and replaced with elements. This change will place less importance on translating attributes after companies adopt DITA 2.0.

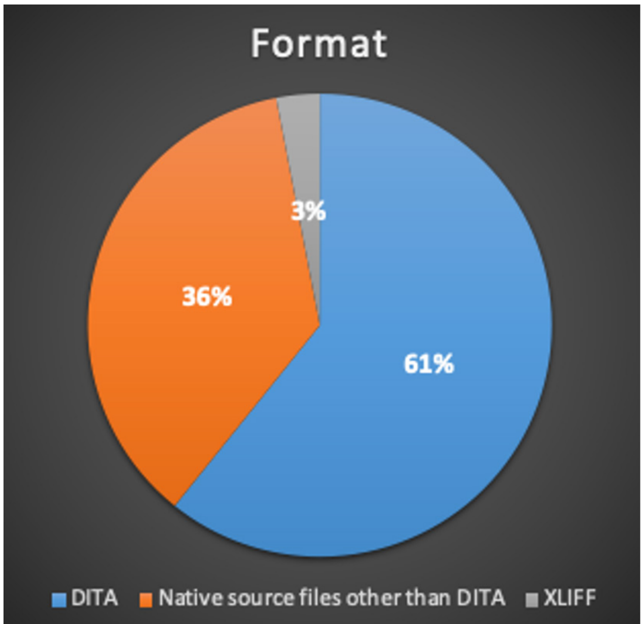
In addition to LSPs, companies use a number of tools for translation.

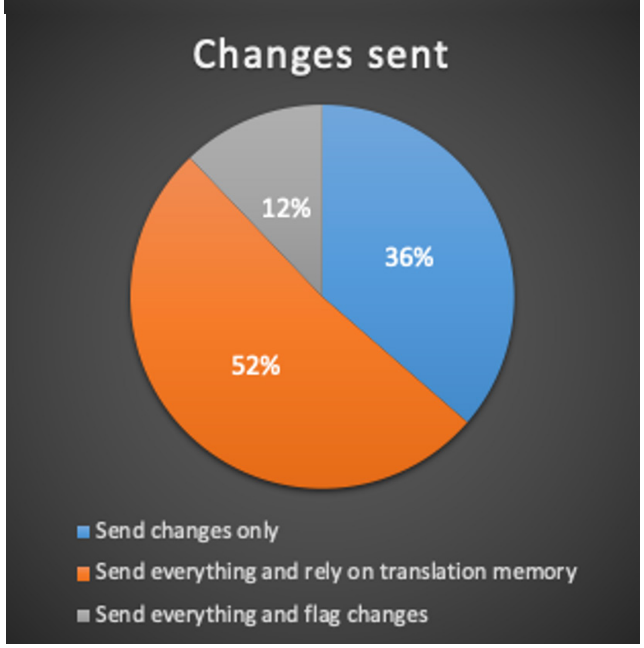
- Translation memory (TM) 85%
- Translation management system (TMS) 68%
- Translation glossary 65%
- Machine translation (MT) 58%
- Terminology management 48%

Most respondents reported that their translation memory is updated based on translation reviews, and for almost half, the translation memory is a deliverable from their LSP. In 39% of companies, all departments share a translation memory. For only a fraction of companies (3%), writers are prompted with translation memory matches while writing new content.

How content is sent for translation

For the most part, companies don't send XLIFF for translation, preferring to send DITA (61%) or other native source files (36%) to the LSP. According to our partner WhP, DITA-aware LSPs usually prefer DITA over XLIFFs because XLIFF hides context information from translators among other issues. Therefore, they recommend sending DITA from your component content management system (CCMS) to your translation management service (TMS). (Source: https://whpintl.com/blog/https-www-whp-net-en-6-reasons-prefer-raw-dita-xliff-localization/





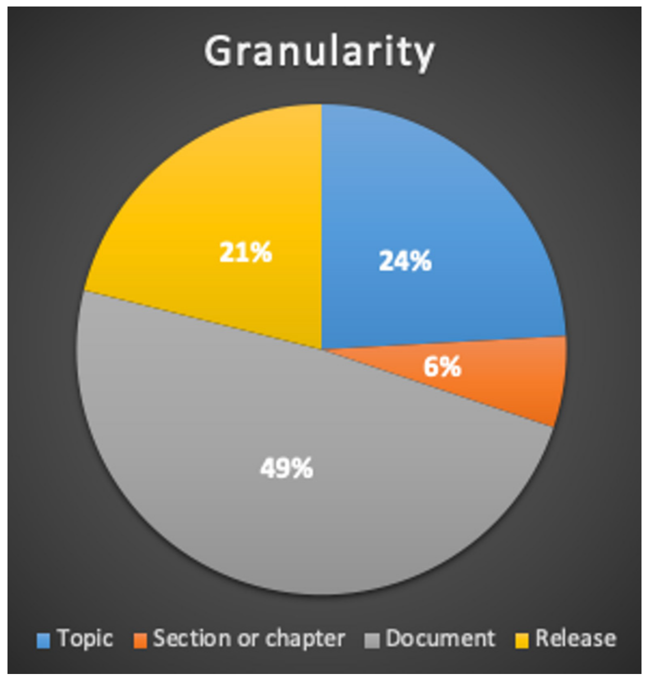
Changes sent

About one third of companies send only changed content for translation, which we consider to be a best practice. A small percentage sends everything and manually flags changes that need to be translated.

About half of companies send all content for translation and rely on the translation memory. We recommend that companies relying on translation examine their contracts to ensure that they do not pay for exact matches. Some vendors charge a fraction of a cent for exact matches which can add up to significant costs when the volume of content is high.

Granularity

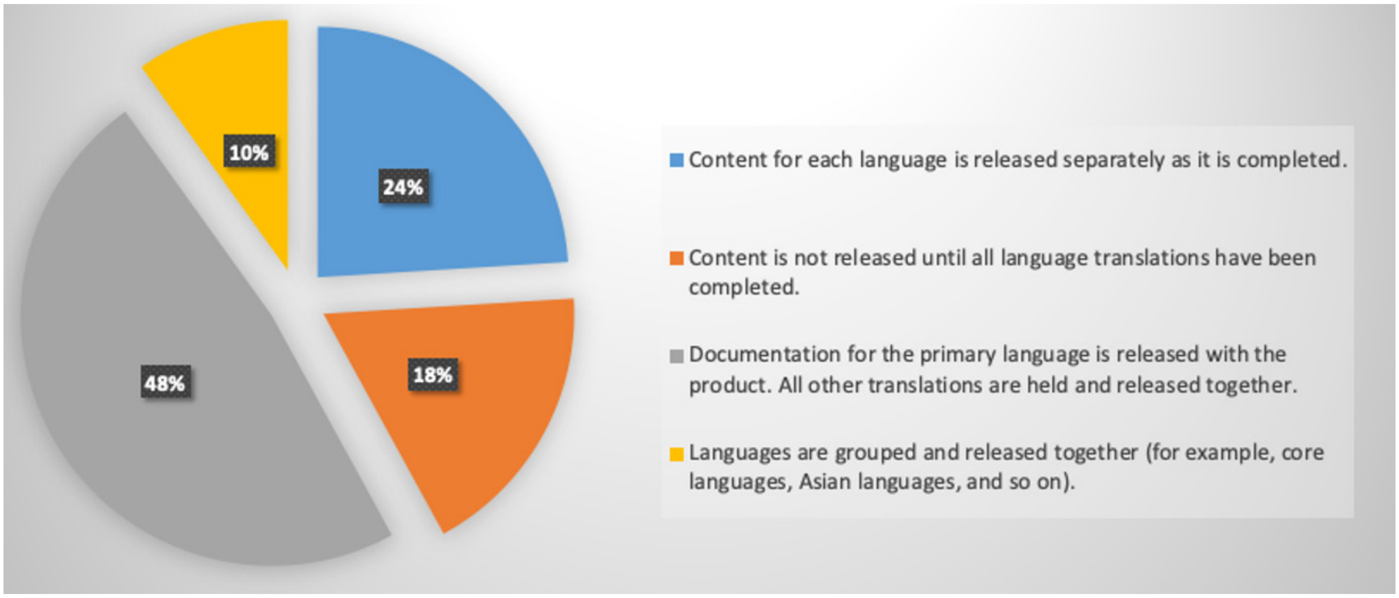
Even though our industry encourages a topic-based approach to writing, a granular, agile approach is not generally used when sending content for translation. Seventy percent wait to send content for translation until an entire document in the source language is ready (49%) or even an entire collection of documents for a release is ready (21%).



Only 30% of companies send content as chapters, sections, or topics. This granularity may be mandated by a continuous release cycle, but sending content for translation iteratively reduces the turnaround time and ensure that all languages are ready to publish at release instead of requiring customers to wait for documentation in their preferred languages or delaying the release for translation.

Release process

How content is released is most likely tied to the granularity at which content is sent for translation. Less than 20% of companies hold all content for release until all translations are completed. It is much more common to release content in phases. Almost half of companies include documentation for the primary



language with the product release and then publish all translations together at a later date. The remaining companies release content for each language as it is completed or in groups of languages based on region or type (for example, core languages, Asian languages, and so on).

When content is released, 42% of companies use the same stylesheet for all languages, 17% use two stylesheets, and 25% have three stylesheets. If companies publish multilingual documents, 80% publish the languages one after another, and 20% publish the languages side-by-side.

Translation time

Not surprisingly, when we asked how long companies allow for translation, the answer was, “it depends.” Some companies use a formula, but no two answers were the same and varied from three days to months depending on planning (or lack thereof), project size, urgency, and quality. One respondent commented, “Ha! With planning we align on delivery schedules. With no planning, we negotiate between when it's wanted and what's possible."

How is content created

Quality translations rely on quality source content, so we queried members to find out how they write and review content.

Info models and style guides

We asked which of the following translation best practices are included in their information models or style guides. These best practices apply to all content, regardless of whether it will be translated.

- Preferred terminology 88%
- Simplified Technical English 52%
- Minimalism 48%
- Units of measure 42%
- Diversity of people based on gender and race 27%
- Cultural examples 27%
- Gendered nouns and pronouns 21%
- Semantic tagging 18%

User research

When it comes to gathering research about users within target languages, it seems there is much room for improvement. Most members responded “never” or “some of the time” to our questions about whether they do user research for target languages.

In other words, very few companies are checking whether the content they’re translating is meeting the needs of their users. It can be difficult for writers to gather user research about their users in their primary English-speaking audience, so it is not surprising to see these responses.

	Most of the time	Always
Modify language to reflect the unique needs of users in each target language	12%	9%
Gather analytics and feedback for each target language	3%	21%
Conduct user surveys and interviews on audiences outside our source language	3%	3%
Ask others in company, such as field engineers or marketing, about the needs of users in their locations	15%	15%

Reuse

Translation does not appear to have a significant impact on reuse among our members. About 80% of members responded that translation considerations don't impact reuse strategies. They either rely on translation memory to recognize reused content or expect their LSPs to adjust tagging for keys and such. Only 15% reported that they have any restrictions on reuse, such as reusing content only at full sentence granularity. No members reported that translation prevents them from reusing content entirely.

Quality

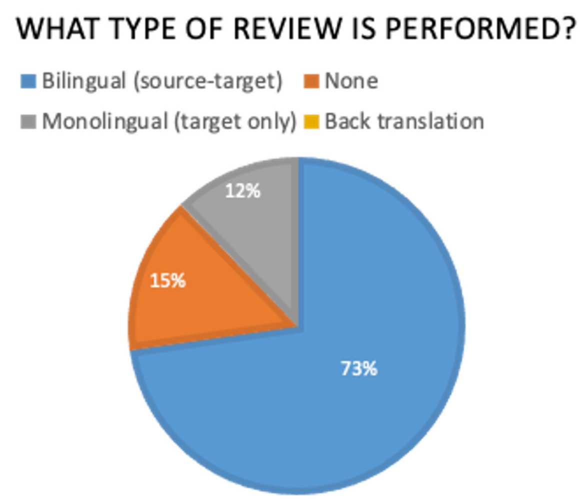
To ensure content quality, members use multiple review types. In order of popularity, the reviews on source content are:

- Technical/SME review 85%
- Peer review 67%
- Copy edit 45%
- Technology assisted review (Schematron, Acrolinx, Congree, HyperSTE) 42%
- Substantive edit 30%

> ***"The challenge is to persuade the content providers to allow enough time for translation and quality reviews. Constant education on cost and timing."***

On translated content, some review is performed on most content, whether it is a bilingual review (73%), during which the source is compared to the target, or a monolingual review (12%) where only the target is reviewed. For 15% of respondents, no review is performed. No members reported that back translation is done for product documentation content. Our understanding is that back translation, where content is translated from the source language to a target language and then back to the source, is mostly done for marketing materials.

Half of companies rely on the LSP to review the content for quality or enlist an employee who is native speaker and has product knowledge to review the translation. Only a quarter hire an independent LSP to do a quality review.



To measure translation quality, companies rely on the following measures:

- User feedback 45%
- Turnaround time 30%
- Number of translation mistakes per number of words translated 30%
- The content validates and publishes 21%

Some members reported that their companies don't measure translation quality in any way (21%).

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

Assessing the Amount of Redundant Content in Our Documentation: Advancing Content Reuse with Analyzer 2.0
April 26, 2023 at 12:00pm – 1:30pm EDT: Webinar
https://www.infomanagementcenter.com/product/assessing-the-amount-of-redundant-content/

Minimalism: Creating Information People Really Need
April 26, 2023 - May 31, 2023: Online Course
https://comtechservices.com/training/minimalism/

Editing Essentials for Writers and Editors
April 27, 2023 - June 1, 2023: Online Course
https://comtechservices.com/training/editing/

Publishing for DITA
April 27, 2023 - June 22, 2023: Online Course
https://comtechservices.com/training/dita-publishing/

Confab
April 30 – May 3, 2023: Minneapolis, Minnesota
https://www.confabevents.com/

Developing Your Content Strategy
May 2, 2023 - June 20, 2023: Online Course
https://comtechservices.com/training/content-strategy/

Using structured authoring to publish videos at scale
May 10, 2023 at 12:00pm – 1:30pm EDT: Webinar
https://www.infomanagementcenter.com/product/structured-authoring-to-publish-videos-at-scale/

STC's Technical Communication Summit
May 14 – 17, 2023: Atlanta, Georgia
https://summit.stc.org/conference/

WhP Academy: DITA Localization Fundamentals
June 6, 2023 - June 20, 2023: Online Course
https://whpintl.com/company/whp-academy/

LavaCon
October 14 – 17, 2023: San Diego, CA
https://lavacon.org/

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