



## From Short-Order Cooks to Top Chefs Shifting the Cultural Stereotype of Writers



Melanie Davis, Reltio

*In the tech world, we Technical Writers are often relegated to short order cooks when we really are top chefs. Are you ready to claim your space at the product definition table? Then set aside that spatula, put down that order pad, and don your hard-earned chef whites with pride! Learn to stop asking product management and engineering stakeholders if you can add fries to the uninspired burgers they give you to rehear and serve. Shift to asking them for the business and development ingredients you need to create inspiring and effective documentation users will clamor to consume.*

When I discussed these ideas with Dawn Stevens in her inaugural episode of the Technical Documentation Wrangler on February 1, 2023, I was the Managing Editor, Technical Content, at Reltio. Since then, I've been promoted to Sr. Manager, Content Tools and Operations at Reltio, and I remain President of my consultancy, Dragonfly Diva Docs. This approach is based on my 30+ years in technical writing, editing, localization, and training with individual clients, startup companies, and global enterprises across the US and the UK.

Dawn and I had a wonderful conversation on that day, and we both received requests to dive in deeper than we were able to in our 1-hour webinar. So, pull up your seat at the table!

Effective technical writing often relies on similes to convey new concepts in a familiar way. Technical writing is like cooking in these key aspects:

- ◆ Content development and meal preparation both require a cross-functional team of specialists.

- ◆ Content and cooking cater to the specific requirements and preferences of their consumers.
- ◆ Technical Writers and cooks are frequently viewed with the cultural perception that anyone can do their job.

Most people leave home with basic cooking skills – they can grill a sandwich, boil pasta, chop veggies, bake cookies, or fry an egg. Similarly, everyone learns to write while they are in school. While most people might say they could easily serve up a decent omelet or spaghetti Bolognese for family and friends, they would stop short of elbowing José Andrés, Ina Garten, or Bobby Flay aside in their professional kitchens. Diners can see and taste the difference between food prepared by an everyday cook and a chef of that caliber.

Similarly, when users need help using complex applications or equipment to do their jobs, they don't have a great appetite for difficult-to-digest techno babble or superficial feature-and-functionality highlights. Their tummies are rumbling for a full three-course meal of conceptual, procedural, and reference information.

In this article, I share tips on how you can share with stakeholders and subject matter experts (SMEs) in your organization the difference between what they might write (as home cooks) and what we write (as professional chefs).

### DINNER AT THE PRODUCT RESTAURANT

Documentation isn't a mere compliance checkbox but a valuable part of the product. Users can't hunt for help in the software code or on a factory floor any more than diners can scavenge for food  
*(continued on page 6)*

### CONTENTS

**From Short-Order Cooks to Top Chefs**  
Melanie Davis  
page 1

**Riley the Writer, a Jolly Happy Soul?**  
Dawn Stevens  
page 2

**There are no snakes in the CMS!**  
Lindsay Lightbody  
page 7

**How to Boost Content Discovery Experiences-Best Practices**  
Anu Singh  
page 10

**Manager's Calendar**  
page 14

**CIDM Sponsors Highlight**  
page 15

BEST PRACTICES NEWSLETTER

A publication of The Center for Information-Development Management. 710 Kipling Street, Suite 301 Denver, CO 80215 Phone: 303-232-7586 [www.infomanagementcenter.com](http://www.infomanagementcenter.com) [info@infomanagementcenter.com](mailto:info@infomanagementcenter.com)

PUBLISHER AND CIDM DIRECTOR Dawn Stevens

PRODUCTION COORDINATOR Trish Grindereing

HOW TO SUBMIT AN ARTICLE: Trish Grindereing [patricia.grindereing@comtechservices.com](mailto:patricia.grindereing@comtechservices.com)

HOW TO JOIN THE CIDM: [info@infomanagementcenter.com](mailto:info@infomanagementcenter.com)

©2023 Comtech Services, Inc. All rights reserved. Printed in the USA.

Connect with us on [LinkedIn](#)

# From the Director



## RILEY THE WRITER, A JOLLY HAPPY SOUL?

For some reason that made sense at the time, it has become a tradition for me to dedicate my December column to a re-imagining of classic Christmas stories and songs into technical writing tales of cheer.

Thus far, these rewrites have included:

- ◆ A Christmas Carol
- ◆ It's a Wonderful Life
- ◆ How the Grinch Stole Christmas
- ◆ The Night Before Christmas
- ◆ The 12 Days of Christmas

This year, for your enjoyment, I bring you my version of "Frosty the Snowman," originally written by Jack Rollins and Steve Nelson, and first recorded by Gene Autry in 1950. It was later adapted into the animated classic Christmas cartoon in 1969, with Jimmy Durante singing the theme song.

### RILEY, THE WRITER

Riley, the Writer  
Was a frantic, stressed out, soul  
With a deadline near at the end of the year  
And two SMEs out of control.

Riley the Writer  
Had an A-I tool in use  
To help simplify  
And demystify  
Content formerly obtuse.

There were a lot of errors  
In the generated text.  
And Riley worked to figure out  
The prompt to try out next.

Oh, Riley, the Writer  
Had to edit carefully  
Catching made-up facts  
And incomplete gaps  
Removing all uncertainty.

Clickety click click; clickety click click.  
Look at Riley type.  
Clickety click click; clickety click click.  
Getting the content right!

Riley, the Writer  
Knew the SMEs would give no aid  
They were overworked  
And were getting irked  
At the questions teams conveyed.

At the computer  
With a DITA tool installed  
Good consistency  
And efficiency  
All were properly enthralled.

There was a lot of reuse in  
The old version they had  
Conrefs and keys used with some care  
Rendered content not half bad.

Riley the Writer  
Had to finish right away  
With one button push  
All required outputs  
Were complete by end of day.

Clickety click click; clickety click click.  
Look at Riley write!  
Clickety click click; clickety click click.  
Meeting deadlines tonight!



*Happy Holidays everyone!*  
Dawn and the rest of the Comtech team

(continued from page 1)

in a restaurant kitchen. If features and functionality aren't described in the documentation, they're not on the menu, so customers don't know they're available to order.



**Yes, chef!**

In a fine dining establishment, before a customer is ever served a meal, there are many people involved from the restaurant owner, maître d' and wait staff, to the head chef and kitchen staff.

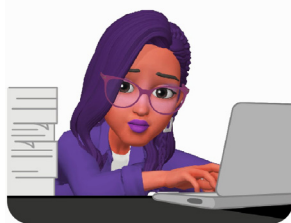
The same is true in the "product restaurant" with functions focusing on their areas of expertise:

- ◆ Company Leadership – Restaurant owner (determine style of cuisine, equip, and manage the restaurant).
- ◆ Product Management – Restaurant general manager (plan menu options, order inventory, and set prices).
- ◆ Product Marketing – Restaurant marketing manager (plan promotional strategy, create social media content, and design advertising).
- ◆ Software Engineering – Food and beverage manager (manage inventory, ensure compliance with health codes, and create well-paired food and drink menus).
- ◆ Documentation – Chef (develop recipes, create menu, and prepare and plate full-course meals).
- ◆ Customer Support – Restaurant host (manage customer satisfaction, share customer complaints, and provide follow up).

Just as top chefs can elevate a mundane meal to a fine-dining experience, Technical Writers can transform dull data into edifying and engaging content. This doesn't mean only folks with Technical Writing, Journalism, or English degrees make good Technical Writers. Not all top chefs went to culinary school. In fact, many celebrity chefs without formal culinary

training established their reputation through experience and sharing their knowledge. Still, not everyone who can boil an egg can be a top chef, and not everyone who can punctuate a sentence can be an effective Technical Writer.

What it takes for a pitmaster to demonstrate their BBQ chops is decidedly different from what puts the cherry on top of a baker's prize-winning cake. Similarly, what it takes to write a PhD-awarded thesis is completely different from what it takes to write a Nobel Prize-winning novel, which is completely different again from what it takes to write award-worthy technical documentation. What we're talking about is the difference between an *academic* or *creative*



WRITER and a TECHNICAL WRITER. The difference between whipping up a tasty omelet at home for the family on the occasional weeknight and

creating haute cuisine in a renowned restaurant for discerning diners to consume 2-3 times a day, 7 days a week, 365 days a year.

### RISE THROUGH THE RANKS

Technical writing roles are similar to the progression of a line cook to a top chef. You don't get to start at the top – and, really, in what industry do you?

You do need to equip yourself to rise through the ranks:

#### 1. Food prep: Chop and portion ingredients

When you start in food prep, become an expert at chopping potatoes, slicing tomatoes, and shredding lettuce. Learn which knife to use for which purpose and the difference between a thin slice and a rough dice.

This is you, entry-level Technical Writer. You're going to update legacy content and write Release Notes, Quick Start Guides, and small topics.

#### 2. Line cook: Heat up pre portioned and prepared ingredients.

### 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.



Melanie Davis  
Reltio

A passionate professional communicator specializing in technical data transformation and content curation, Mel Davis is a long-term industry veteran who is currently Sr. Manager Content Tools & Operations at Reltio and president of her own consultancy, Dragonfly Diva Docs.

Clear, consistent, and compelling communications are as much her hallmark as her signature color purple. Mel has honed her technical writing, editing, localization, project management, and literary copywriting skills with individual clients, startup companies, and global enterprises across the US and in the UK.

Yes, anybody can boil an egg. But how many people can boil a perfect egg? Check out the sheer number of recipes for this basic cooking task as well as the contentious views on what constitutes eggy perfection! Learn not one way, but multiple ways to satisfy different appetites and taste buds.

Hello, Technical Writer! I see you there updating full sections of legacy content and getting a chance to create entirely new documents.

**3. Cook:** Develop an area of specialization in preparing vegetables (entremetier), fish (poissonier), meat (rotisseur), or sauces (saucier).

Well, now, Sr. Technical Writer, there you are developing your signature dishes. You're the go-to for specific products/features, Information Architecture, API, SEO, visual content, or content tools while assisting more junior writers to hone their skills.

**4. Chef:** Lead kitchen operations for line (commis), station (de partie), pastry (pâtissier), second (sous), head (de cuisine), and executive (patron).

Congratulations Lead Technical Writer! Now, on top of writing yourself, you're looking after plans, schedules, tools, processes, and training to ensure the team delivers content on time.

Yes, Chef! As the Documentation Manager, you're coordinating closely with the rest of the cross-functional teams to ensure that your team of Technical Writers has the information, time, tools, and talent they need to succeed. You also gently sweep all of the functions who don't specialize in actual food preparation out of the kitchen to give your team the space they need to prepare content in the most favorable circumstances.

At each stage, take every opportunity to hone your skills and master your craft, and most importantly, determine where your interest and talent lie. Even at the "line cook" stage, make sure yours are consistently the best burgers and fries, with the freshest garnishes, the most sumptuous sauces, and the most perfectly toasted bun. If you're not doing this exceptionally well, no one is



going to ask you to be responsible for creating a more complicated meal.

You can't up your game unless you've "got game." Here's how to get yours:

- ◆ **Be proactive:** If you have technical skills gaps, close them. Ask knowledgeable colleagues for pointers, including books/articles to read and courses to take. Take courses available on LinkedIn, professional organization sites, and other learning platforms you have access to.
- ◆ **Be prepared:** Software engineering, product managers, and other SMEs are under the same crushing deadlines you are. When you request time, be clear about what information and time you need from them and stick to it.
- ◆ **Be reliable:** Set expectations clearly and communicate progress and issues regularly. The problem isn't about falling behind; it's about not raising the flag in time for other team members to adjust on their side.
- ◆ **Be positive:** Don't whine or complain. Work is not a popularity contest, but who wouldn't prefer to work closely with someone agreeable who contributes positively to the team? Be a great teammate.
- ◆ **Show your work:** Take before and after shots of the documentation you worked on to demonstrate the professional polish you added. Be sure to share them.
- ◆ **Monitor industry trends:** Break a few eggs—but first read lots of recipes. See what other Technical Writers in your industry are producing. Keep up with trends until you become a trendsetter!

**SHIFT FROM "ORDER UP" TO "YOUR MEAL IS SERVED"**

Both technical documentation and cooking cater to the specific requirements and preferences of their consumers. Technical writers and chefs need not only to understand what their consumers want but what they are able to prepare based on the ingredients and equipment they have to work with.

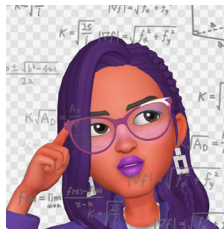
This doesn't mean that every document request needs to be a four-course meal served on a linen tablecloth. There is a place for fast food, diners, and chain restaurants as well as fine dining establishments. Each is designed to meet specific tastes at specific price points. Your job isn't to convince people to replace burgers and fries in a bag with steak and potatoes on a china plate. Your job is to recognize which type of restaurant you're working in and then make the best possible version of every item on that menu.

*“Wow, would you look at that punctuation? That Oxford comma is consistently used throughout!” said no customer ever.*

As a Technical Writer, of course you have a solid grasp on grammar, a rich vocabulary, and deep familiarity with dictionaries and writing style guides. That's the minimum qualification for being a “line cook”. It's also where many Technical Writers languish on the career ladder. “Wow, would you look at that punctuation? That Oxford comma is consistently used throughout!” said no customer ever.

Technical Writers are frequently branded as the “grammar police,” so you must work hard to overcome that limited (and career-limiting) perception. Instead of writing tickets for grammatical infractions, show why it is more effective to write in active vs. passive voice, second rather than third person. Demonstrate how graphics enhance rather than replace text, how titles and lists improve scannability, how consistency enforces understanding and retention.

Invest in a good knife set, that is, sharpen your technical expertise. This is your professional edge. For example, software Technical Writers know as much about coding as software developers—we just write in other coding languages such as DITA/XML or HTML. If you're a software Technical Writer, make it your business to achieve literacy in the coding languages you're documenting and be able to discuss and test code examples yourself. Whether you write about enterprise software, heavy machinery, consumer goods, finance, or medical equipment, be prepared to demonstrate a clear understanding of that industry. This may



seem uncomfortable if you're a writer who has landed in this career from a deep desire to avoid STEM stuff. Actually, this is your superpower—researching and explaining technical topics to laymen.

Technical writers are typically assigned to entire products or feature sets, whereas engineers tend to focus on a narrower set of components. Your advantage is in seeing the big picture. Speak up (or write it down)! Identify inconsistencies across features/products, offer suggestions on product improvement opportunities, contribute meaningfully to discussions, volunteer where your expertise can make a difference. Be a customer advocate and insist on transforming raw technical details into consumable content.

When stakeholders give you frozen burgers and fries, heat 'em up. Then source your own meat and potatoes and show them better menu options. A thin, dry, gray burger with limp lettuce and soggy bun vs. a thick, juicy, grilled burger with fresh beefsteak tomato, crisp lettuce, and toasted brioche bun. The before and after shots make the choice clear. Now you're producing well structured, clearly written, and engaging content that helps the user do their job using your organization's tools instead of pushing out thinly veiled specs about how the application was coded.

Do more than make a rough draft pretty; provide useful and engaging information. Put the finishing touches on so your content isn't just edible but palatable. We're not talking about bright colors and font changes, which are just so much ketchup and mustard on an unappetizing burger.

Got their attention by doing a bang-up job on the basics? Now you're ready to go large! Build on the information architecture, taxonomy, and style standards that are the quality ingredients in your recipes. Add those special cooked-to-order navigation methods and working examples based on target users or industry scenarios. Be mindful that the documentation you produced for one product or customer group won't necessarily work equally well for a different palate. You may need to adjust your recipe for baking at higher altitudes or provide gluten-free substitutions. As you scale up your offering and speed, be careful to retain your consistency. Remember to taste-test significant changes with your cross-functional stakeholders to remain true to the restaurant's type.

Now you're ready to go gourmet. When you go to a Thai restaurant, you are asked how spicy you want your dish prepared. When you go to a steak restaurant, you are asked how you want the steak cooked. Let customers choose their content consumption preferences. For example, provide both text and video content when you can. You wouldn't give diners a fork for soup, so don't provide printed manuals for customers who don't work at their own desk or digital content for customers who don't have access to computers.

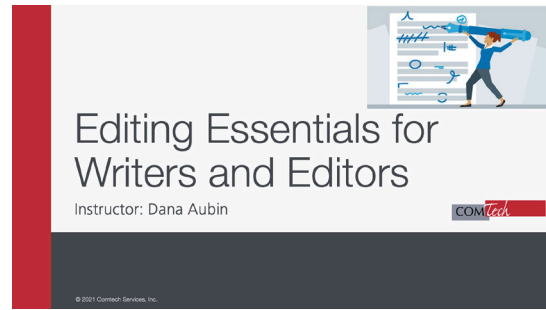
**FOOD FOR THOUGHT**



Even if you master all of these tips, your organization may not make the cultural shift from “Any fool can write” to “Technical Writers have a unique skill set for developing effective and easy-to-absorb and retain technical content.”

You will probably still be asked to “just make this look pretty” (“Do you want fries with that?”). Don’t be discouraged. Keep working to “make this make sense” (“What do you have a taste for this evening”).

When we do what we do well, users can tell. Be sure to solicit user feedback (site analytics and comments in Support tickets count). A delighted user will have the greatest impact on moving documentation requests from “format this document” to “here are some product ingredients into a delightful dish!” 🍷



**TWO-HOUR SESSIONS HELD WEEKLY  
EVERY THURSDAY  
JANUARY 25— FEBRUARY 29, 2024**

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.

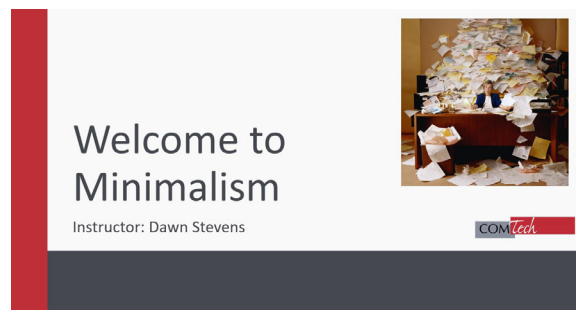
<https://comtechservices.com/event/editing-essentials-for-writers-and-editors-online/>



**TWO-HOUR SESSIONS HELD WEEKLY  
EVERY THURSDAY, INDIA STANDARD TIME  
JANUARY 11— FEBRUARY 15, 2024**

An introduction to the DITA standard and hands-on practice creating topics, assembling topics into maps, applying metadata, and publishing final deliverables.

<https://comtechservices.com/event/dita-basics-01-2024/>



**TWO-HOUR SESSIONS HELD WEEKLY  
EVERY THURSDAY, INDIA STANDARD TIME  
JANUARY 25— MARCH 8, 2024**

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://comtechservices.com/event/minimalism-creating-information-people-really-need-2024/>

# There Are No Snakes in the CMS!



Lindsay Lightbody, Agilent

As a kid, when I got into my usual frenzy of trying to finish my chores so I could get back to more fun endeavors, my mother used to say, “Don’t go at it like you’re killing snakes.” It is a regional saying, but it means something pretty simple: slow down, take your time, be thoughtful.

The same is true if you are moving to a content management system. Slow down, take your time, be thoughtful.

My team and I are currently moving forty-seven service manuals, authored in Word, into a CMS. We have learned a lot while tackling this project. The advice in this article comes from hard-won experience. We learned if you slow down early in the process and take time to map out your plan, you will save yourself from later having to clean up a disorganized library of content.

*My mother used to say,  
"Don't go at it like  
you're killing snakes"*

## DESIGN AND DOCUMENT YOUR STORAGE INFRASTRUCTURE

For us, this meant defining a clear folder structure for storing content in our CMS. We created naming conventions for our folders so anyone moving content into the system could feel comfortable creating folders on the fly. We designed our storage structure to act like a decision tree, which made it easier for our authors to decide where content should be stored as they copied content into the system.

Create as many folders as you need to make it easy for you to categorize your content. Although you might be tempted to consolidate content into as few folders as possible, make sure you’re not sacrificing ease of use for mindless minimalism. For us, we moved to a CMS to maximize our

reuse, but we for some reason had the urge to minimize our content storage structure at the same time. There seemed to be a feeling that minimal folders would make the library easier to navigate. We quickly learned minimalism was not our friend when it came to content storage.

### Questions to ask:

1. What categories apply to our content? For example, if you have content related to software and hardware, could Software and Hardware be possible categories for grouping content, with sub folders underneath them to further categorize the content?
2. What subcategories apply to our content?
3. Where/How do we store content that is unique and unlikely to be reusable across multiple books?
4. What categories apply to our image files? (E.g., Tools, Instrument Body, Test Documentation, etc.)

### CREATE A TOPIC INDEX

As you pull content into your CMS, enter the topic title into a spreadsheet or database that can serve as an index for your library of topics. Use this index to store relevant, reportable information. For example: where the topic is stored, whether it is reused and in which manual, etc. This is especially important if your CMS software does not provide a lot of reporting functionality. A topics index is a way to work around that limitation.

### Questions to ask:

1. What information do we need to track about our topics?
2. What kinds of reports would we appreciate being to generate related to our CMS library?
3. What reporting does our CMS offer? Are those adequate for our needs? Can we supplement with our Topics Record?

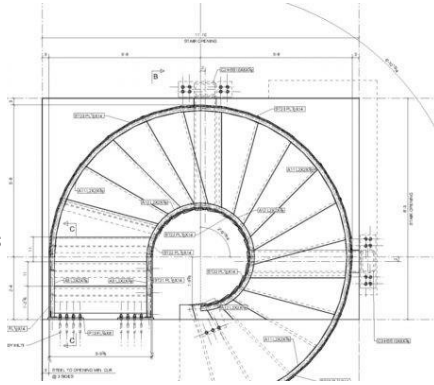


Lindsay Lightbody  
Agilent

Lindsay Lightbody is a technical writer for a global company that provides instruments, software, services, and consumables for laboratories. She lives and works in Winooski, VT.

### DEFINE STORAGE AND ID CONVENTIONS FOR CONTENT REFERENCES

If reusing small elements of content, called content references, create infrastructure to categorize that content. This is another area where minimalism does not make sense! Create all the files as you need to store each type of content reference.



#### Questions to ask:

1. What categories apply to our content reference files? For example, should all reusable note content go into one big file, or does it make sense to break that apart into distinct categories? (E.g., Warnings, Cautions, Important)
2. What naming conventions do we use for naming conref files?
3. What naming conventions do we use for defining the conref id attribute?
4. Do we want to ensure we store all content references in a discreet content reference file, or do we allow users to create a content reference within another topic?

### DEFINE TITLE/FILENAME CONVENTIONS

Define and document file name conventions. Ask yourself, what are our conventions and what does someone need to know to bring content into alignment with those conventions?

#### Questions to ask:

1. What standards do we have for titles? E.g., Are we a gerund or a no-gerund shop? Title case or sentence case?
2. What naming conventions do we use for image files?

### IDENTIFY REUSE POTENTIAL

If possible, do your best identify reuse potential before starting to move content into the CMS.

Consider holding frequent, scheduled meetings with SMEs to map out reuse potential for your content. Once you feel you have identified reusable content, consider moving that content into the CMS first. As you continue to move all your content into the CMS, you may find that the process becomes easier if you have a large library of reusable content already in the CMS and available for addition to your bookmap or table of content file.

### CREATE TEMPLATES

When creating templates, minimalism is mindful. You want to anticipate and create all the templates you need but do try to keep the number of templates low. Creating too many templates may lead to a situation where your team finds it difficult to select the right template without a lot of guidance. To help your team out, give your templates very descriptive, even comically descriptive, filenames.

Share these templates with your teammates and your subject matter experts and aim for consensus, both on the format of each template and the types of templates required, before proceeding.

#### Questions to ask:

1. Beyond the standard Task, Concept, Reference topics, what types of templates do we need?
  - a. For example, if your shop creates a tool list topic that details all the tools required for a task and places this topic before the procedure topic, you need a template for the tool list.
2. Are there any templates that we think might improve consistency and standardization in our manuals? Another way to ask this: Is there a type of information we provide regularly, but somewhat inconsistently, that we could formalize using a template?
3. What rules will apply to each template? E.g., all procedure task topics must be preceded by a tool list topic.





**DOCUMENT PROCEDURES**

Before you begin moving content, be sure you have documented all the procedures you need. This is especially important if you have been working in the CMS alone and you're starting to bring more colleagues on board to help you move content.

*Possible procedure needs:*

1. Document any image-editing steps to be done before the image is imported into the CMS.
2. Document steps for determining where topics should be stored to adhere to your infrastructure conventions.
3. Document revision control steps. See below for more detail.
4. Document any review procedures.
5. Document filename conventions for folders, files, topic titles, and images.
6. Document any rules related to your template files.
7. Document any quality control steps you expect someone to do to ensure copied content is complete and accurate.

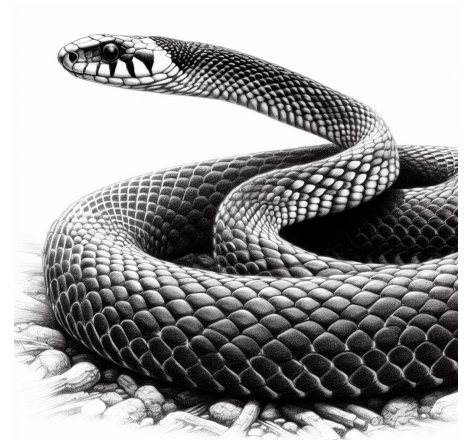
**MAP OUT AND UNDERSTAND YOUR REVISION CONTROL PROCESS**

For shops that need to maintain tight control over revisions, ensure you have documented processes for creating content, editing content, reviewing content, documenting changes, and approving content.

Have these procedures written before you begin moving content into the CMS. Once you start to move content, move only approved content into the CMS.

If you opt to rewrite content as you pull it into the CMS, document the changes you will be making and ensure you can get batch approval to make these changes globally. This might be a good approach to minor changes related to fixing issues where your content does not completely adhere to your style guide (e.g., change "select" to "click"). If you find large issues with content related to organization or clarity, this may not be the best time to tackle those. Follow your shop's standard operating procedures to record change requests and tackle them following your new review and approval procedures.

I can summarize the advice above as follows: To avoid a messy library of content, take the time to design and document your storage infrastructure conventions before moving content into your CMS system. You will save a lot of time in the long run.



It is worth saying again: There are no snakes in the CMS!

Don't go at it like you're killing snakes! 🐍



PLAN TO JOIN US AT CONVEX MINNEAPOLIS

MINNEAPOLIS, MINNESOTA AT THE  
RENAISSANCE MINNEAPOLIS HOTEL

APRIL 8-10, 2024

CALL FOR SPEAKERS EXTENDED!

[Convex.InfoManagementCenter.com](https://Convex.InfoManagementCenter.com)

# How to Boost Content Discovery Experiences - Best Practices



Anu Singh, Fiserv



Anu Singh  
Fiserv

Anu Singh is a Creative disrupter who believes in the enormity of the human mind, its thoughts, feelings, and the social paradigm it creates and coexists in.

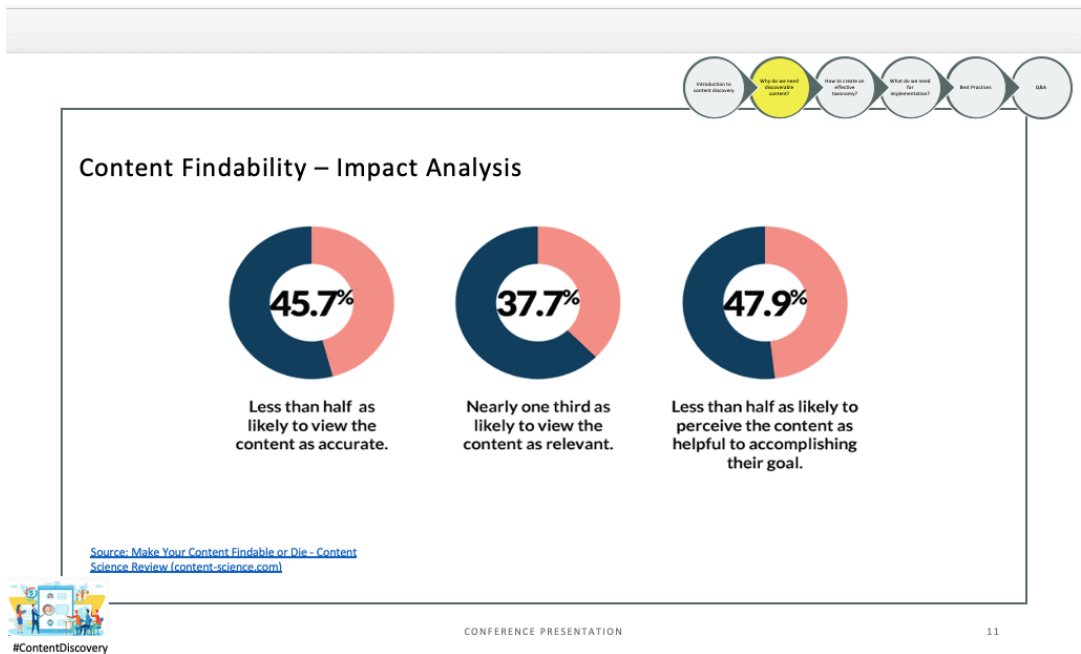
Anu works in the areas of content development and transformation, agile project management, content strategy, and client experiences with a focus on empowering clients in their product adoption journey and enabling their success through content.

Ever wondered why the more you understand the content discovery process that your users experience, the better engaged your customers are with your content?

Seamless Content discovery is vital for creating the perception of quality content that is effective. An impact analysis on content findability shows that there is a significant dip in the perception of content accuracy, relevancy and experience when users cannot find content they need in time. This is why, as content creators, it is our responsibility to support clients on their product adoption journey through a wholistic learning and troubleshooting process supported by high-quality content.

Let's explore some of the best practices for creating an effective content discovery experiences and boosting the overall process.

- ◆ **Understanding User Intent:** When we know our clients really well, we can also anticipate their information needs well and predict their behaviour as well as their content discovery pattern. For devising an effective content discovery process, understanding user intent is crucial as it aligns your content with the needs, expectations, and goals of your audience. This user-centric approach contributes to better SEO, improved user satisfaction, and a more effective overall content discovery process.




Quality content is not just about creating relevant content but also about ensuring that the audience can easily discover content and engage with it to accomplish a task.

To simplify the content discovery, we can break it down as a process using the science and technique of classification leading to more effective and user-centric content creation and organization. Content discovery is a process of searching through and finding content.

Here are some best practices to consider:

- ◆ **Conduct Audience Research:** Start by conducting thorough research on your target audience. This can involve surveys, interviews, or analysing available user data. Understand their demographics, roles, technical expertise, and specific needs related to the product or subject matter.


- ◆ **Create User Personas:** Develop user personas that represent different segments of your audience. These realistic characters must embody the traits, needs, and preferences of real users. Creating personas can make it easier to empathize with your audience and tailor your content to their characteristics.
- ◆ **Segment Your Audience:** Categorize your audience with respect to their expertise and goals, and create content for specific roles and tasks.
- ◆ **Create Documentation for Different Use Cases:** Identify potential reasons for users to refer to documentation and create use cases to address different scenarios, such as installation, troubleshooting, advanced features, and best practices.
- ◆ **Use Feedback and Analytics:** Collect feedback from users of your documentation and use analytics to review specific topics where users drop off the non-performing pages or the frequently visited pages where users spend the most time. This data can provide insights into user behavior and help you refine your documentation.
- ◆ **Involve and engage Stakeholders:** Product managers, customer support teams, and other stakeholders who have direct contact with users can provide valuable insights into common user issues, questions, and pain points. Engage with them early and involve them in the documentation review process as well.
- ◆ **Optimize Search Engines:** Optimizing content for search engines is crucial for improving its visibility in yielding relevant search results. The process involves optimizing content for search engines including using relevant keywords, creating descriptive meta tags, and structuring content in a way that search engines can easily understand. Highlighting a few best practices for consideration to ensure effective SEO (Search Engine Optimization):
  - ◇ **Conduct Keyword Research:** Conduct thorough keyword research to identify the terms and phrases your target audience is likely to use in search queries. Use tools when needed to discover relevant keywords with a good balance of search volume and competition. It is equally important to use keywords strategically and naturally into your content.
  - ◇ **Create High-Quality Content:** Search engines prioritize high-quality content. Consider creating content that is informative, accurate, relevant, useful and supports the decision-making abilities of your users. Content that addresses user intent and provides solutions to their queries tends to perform well in search results.
  - ◇ **Optimize Page Loading Speed:** Users and search engines prefer fast-loading pages and you can influence the speed by compressing images, removing obsolete code and jargons. You can also consider content delivery networks (CDNs) to improve page load times.
  - ◇ **Update Content at regular intervals:** Regularly update and refresh your content to ensure that the site remains active and content stays relevant.




## How to boost content discovery process?

**Audience Research**


Who is your audience?



What does your audience need or want?



What are the pain points and misconceptions of your audience?



Audience feedback on the existing content



Additionally, optimize meta tags by creating descriptive meta titles and meta descriptions for each page and create SEO-friendly URLs. Use header tags and optimize images with alt text.hing action.

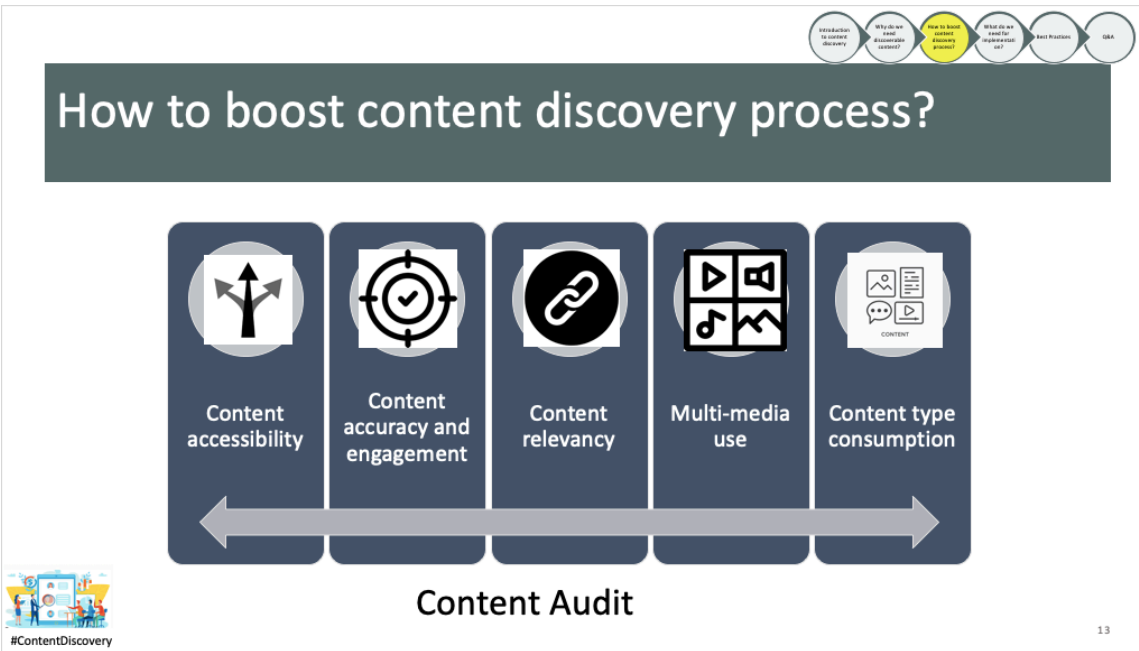
- ◆ **Content Categorization and Tagging:** when content is appropriately categorized and tagged, users can navigate through the information more efficiently with an enhanced accessibility. It is important that we do not offer a mixed bag of content and let users struggle for the information they need when they need it. Segregating information with respect to specific tasks and roles reinforces the availability of self-service information as well. This in turn, enhances the overall content discovery experience.

Additionally, using taxonomy is a more pragmatic way of creating and accessing information focusing on the right content, right set of people and at the right time. Identifying the best taxonomy structure for your business to plan, develop, and manage content in written or digital media makes it possible to select the right content for the right audience. Some considerations:

- ◆ When you know what type of taxonomy you need, you can start to define attributes that connect content in ways that build amazing experiences, and ultimately connect customers with the right content.
- ◆ If your content volume is low, a simple approach will probably work best for your content management. If you have a lot of complex content, you will likely need a faceted system.


- ◆ **User-Friendly Navigation:** A well-structured website or platform with intuitive navigation menus and clear pathways helps users locate the information they need without frustration. Creating user-friendly navigation is essential for a positive content discovery experience. Here are some best practices for designing navigation that enhances content discovery:

- ◆ **Clear and Intuitive Structure:** Organize content in a logical and intuitive structure. Users should be able to quickly understand the hierarchy and relationships between different sections of your website or platform.
- ◆ **Ease of Navigation:** Keep navigation menus simple and concise and avoid too many options. Use clear labels for menu items that reflect the content users can expect to find. Implement breadcrumb navigation to show users their current location within the site’s structure. Maintain a consistent layout and navigation structure across pages to create a predictable experience as they navigate through different sections of your site.
- ◆ **Use Descriptive Labels and group content logically:** Use descriptive labels that accurately represent the related content or logical category they lead to, helping users anticipate what they’ll find when they click.
- ◆ **Responsive Design:** Ensure responsive navigation that works seamlessly across various devices and screen sizes. An effective device strategy ensures all the users irrespective of the device they are using have a similar intuitive experience.



- ◇ **Search Functionality:** Include a search function to provide users with a quick way to find specific content and complements other navigation methods.
- ◇ **Minimalism and Progressive Disclosure:** Apply the principles of minimalism for progressive disclosure. Start with essential navigation options and reveal more detailed or advanced options as users explore further into your platform.
- ◇ **Accessibility Considerations:** Ensure that your navigation is accessible to users with disabilities. This includes providing alternative text for images, creating a logical tab order, and ensuring that keyboard navigation is smooth.
- ◇ **Feedback Mechanisms:** Always gather feedback to improve the overall experience.
- ◆ **Collaboration Across Teams:** Encourage collaboration across teams, including content writers, SEO specialists, UX designers, and developers. Effective content discovery is a collective effort that involves expertise from various disciplines.
- ◆ **Analytics and Iteration:** Regularly analyze user behavior, track popular content, and assess the effectiveness of different strategies. Use this data to iterate and improve the content discovery process continually. Also, as Dr. Deming has said that it is wrong to suppose that if you can't measure it, you can't manage it – a costly myth, iterate the process and get a benchmark for analytics and continue to improve.

In a nut shell, to boost content discovery, consider the five boxes and perform content audit at a regular cadence to enhance the overall content performance and discovery experiences.

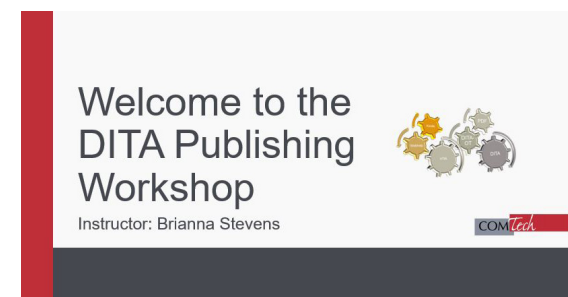
To conclude, a strong content discovery process helps organizations impactfully reduce support calls, increases ROI through SEO findability, boosts customer self-service and enhances the overall content experiences of users. An effective content discovery process helps in finding, discovering, and sharing quality content for driving efficiencies of users and paves the way for an enhanced client experience. 



**TWO-HOUR SESSIONS HELD WEEKLY  
EVERY THURSDAY  
JANUARY 18— MARCH 14, 2024**

A structured approach to making technical information more accessible by labeling it according to the categories and terminology important to your users.

<https://comtechservices.com/event/taxonomy-1-2024/>



**TWO-HOUR SESSIONS HELD WEEKLY  
EVERY THURSDAY  
JANUARY 18— MARCH 14, 2024**

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://comtechservices.com/event/publishing-for-dita-01-2024/>

Please visit our web site at [www.infomanagementcenter.com](http://www.infomanagementcenter.com) for more information on these and other events.

**Quality-Checking your Content Conversion**

January 11, 2024 at 12:00pm – 1:30pm ET: Webinar  
<https://www.infomanagementcenter.com/product/quality-checking-your-content-conversion/>

**DITA Basics Training: India Standard Time Schedule**

January 11, 2024 - February 15, 2024: Online Course  
<https://comtechservices.com/event/dita-basics-01-2024/>

**Breaking Barriers: Content Pros as GenAI Pioneers**

January 17, 2024 at 12:00pm – 1:30pm ET: Webinar  
<https://www.infomanagementcenter.com/product/content-pros-as-genai-pioneers/>

**Creating An Effective Information Taxonomy**

January 18, 2024 - March 14, 2024: Online Course  
<https://comtechservices.com/event/taxonomy-1-2024/>

**Publishing for DITA**

January 18, 2024 - March 14, 2024: Online Course  
<https://comtechservices.com/event/publishing-for-dita-01-2024/>

**Editing Essentials for Writers and Editors**

January 25, 2024 - February 29, 2024: Online Course  
<https://comtechservices.com/event/editing-essentials-for-writers-and-editors-online/>

**Minimalism: Creating Information People Really Need: India Standard Time Schedule**

January 26, 2024 - March 8, 2024: Online Course  
<https://comtechservices.com/event/minimalism-creating-information-people-really-need-2024/>

**DITA-OT Day**

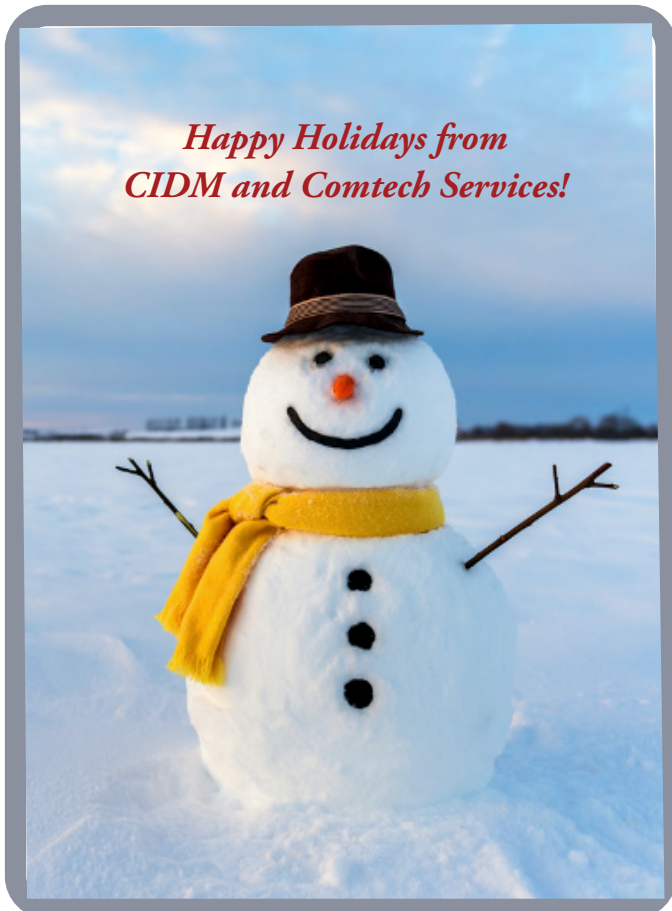
11 February 2024: Helsinki, Finland  
[https://www.oxygenxml.com/events/2024/dita-ot\\_day.html](https://www.oxygenxml.com/events/2024/dita-ot_day.html)

**DITA Europe**

12 – 13 February 2024: Helsinki, Finland  
<https://ditaurope.infomanagementcenter.com/>

**ConVEx Minneapolis**

April 8 – 10, 2024: Minneapolis  
<https://convex.infomanagementcenter.com/>



FANTASTIC FACT-FILLED FORUM IN FABULOUS FINLAND FORTHCOMING IN FEBRUARY!

PLAN TO JOIN US AT DITA EUROPE  
HELSINKI, FINLAND 12-13 FEBRUARY, 2024  
[ditaurope.infomanagementcenter.com/](https://ditaurope.infomanagementcenter.com/)

AND DON'T MISS DITA-OT DAY  
HELSINKI, FINLAND 11 FEBRUARY, 2024  
[www.oxygenxml.com/events/2024/dita-ot\\_day.html](https://www.oxygenxml.com/events/2024/dita-ot_day.html)

