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Maxims of User Documentation: Lessons from the Past Twenty-Five Years

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Probably, 1980 was the year when User Documentation emerged from technical writing as a distinct specialty – perhaps even a new profession. In that year, *Technical Communication*, the journal of STC, offered a special issue on the subject, edited and written by IBMers, filled with such new constructs as **usability** and **task-orientation**.

Perhaps this would be a good time to reflect on the past twenty-five years or so, to discuss what the industry and profession have learned – or stubbornly failed to learn.

Maxim 1: But for feature-richness, User Documentation would have vanished by now.

Because the profession began with hardware writers, and because hardware is far less communicative than software, the old expectation was that all products would need documentation, lots of it. But what became clear by the end of the 80s was that user documentation, especially software documentation, was mainly an attempt to complete or supplement incomplete or inadequate interface design – *that changes in the interface of the product could eliminate or reduce most documentation*. At first, that entailed making things menu-driven and adding context-sensitive Help. Later it meant embedding information directly into a graphical interface, so that most users rarely consulted either manuals or Help.

What has prevented user documentation from disappearing, though, is the rage to add hundreds or thousands of new features to each software release. Despite the official industry propaganda about usability, it is obvious that feature-richness sells more products than ease of use. (Complexity=Unreliability.) Further, the rush to deliver under-tested, feature-rich products to market means that most interfaces are buggy, unreliable, and un-intuitive. This explains manuals the size of telephone directories in support of ordinary business applications. And it might explain the Help utility in Office 2000 – except that there is no explanation for that strange creation.

As has always been true, then, users consult documentation when the system has failed or frustrated them. Is it any wonder that Paul Somerson observed that: “Nobody likes manuals. Fact is, every intelligent user loathes them.”

Whenever the need for external documentation can be eliminated, it should be. Whenever the need for online or embedded Help can be eliminated, it should be.

Maxim 2: Technical publications should not be the work of *Authors*.

No matter how talented the writer, manuals and other documents should be a corporate project, not the work of a single author. All technical publications—especially Users’ Manuals—are in a perpetual state of re-evaluation, update, and revision. *Manuals written entirely by one person are inherently unmaintainable*; that is, no one but the “author” understands the logic and content, so that others are unable to test and modify the publication during the life of its use.

Similarly, *publications tested by their authors are full of bugs*. When a document is an artistic product from a solitary, skilled artisan, that artisan is unwilling and unable to find and correct its flaws.

Maxim 3: Most User Documentation should be assembled, not *authored*.

In 1980, no one was quite sure how to create a useful, readable manual. By the early 90s, though, the problem was mainly solved. Any company publishing unsuitable documentation these days simply hasn’t been paying attention.

Today, 90% of user documentation—paper or online—should be written by filling in the blanks of templates and wizards. Indeed, the move toward single-source documentation (which I predicted in the early 80s) reduces “writers” to compilers and assemblers of information. In many places these days, the job of the technical communicator is feeding modules into a document database.

Is such documentation as good as the old-fashioned kind, which was fashioned by an imaginative and inventive writer, who took pride of authorship? Probably not. But the differences are largely irrelevant in the context that defines most user documentation. Which leads to ...

Maxim 4: Every documentation question is a *business* question.

Every documentation decision hangs from the question: How's Business?

The "right" way to document or support technology products is determined by the needs of *business*, not some set of arbitrary writing standards. Those of us who love language and books, who spent a career mastering the art of the sentence ... we must remember why these publications are produced and who pays our bills. We must, for obvious reasons, distance ourselves from documentation that does not add to the competitive advantage of our products and systems, documentation that costs more than it saves or earns.



There are practical consequences to all these observations. To stay abreast of the times, technical communicators need to learn about:

- Testing for usability, in both publications and interface design
- Implementing modularity and collaborative writing processes
- Developing document databases and applying single-source technology
- Writing proposals and business cases, in support of documentation policies and technology.

Seminars, Courses & Speeches

Business/Professional Communication

How to Sell in Writing (Proposals & Business Cases)

The most important business writing is the *advocacy document*, the pitch for funds or approval.

- Analyzing your audience and Win Strategy
- Presenting the “case” with logic and persuasiveness
- Using business graphics to demonstrate and prove

How to Write *Globally*

International business requires sensitivity to the language, culture, and expectations of the international business partner.

- Editing for clarity and readability
- Screening for figurative and idiomatic confusion
- Designing accessible layouts and appropriate feedback paths

Final Draft: The *Especially* Clear Sentence

Good writing is *rewriting*; only revision can assure clarity, correct tone, freedom from errors, and readability.

- Emphasis and making your point
- Twenty flaws in first-draft sentences
- Style-checking software: Can you trust it?

The Art of the Pitch

A well-made presentation is a small five-act play, where each element contributes to effectiveness.

- Strategic planning and design
- Managing stage fright
- Using PowerPoint™ and other presentation tools
- Handling questions and objections
- Creating useful handouts

The Art of the *Engineered* Memo

Effective memos must be designed to achieve particular objectives for particular audiences.

- High-information headers
- Attention-getting beginnings/action-getting closings
- Formats that cut through the information overload

The Art of Effective E-Mail

To use e-mail well, the writer must exploit its strengths and adapt to its limitations.

- Attention-getting subject lines
- Elements of ASCII style
- Discipline and etiquette for e-mailers
- To attach or to embed ...

IT/Technical Communication

A Writing System for IT/Technical Professionals

Technical professionals cannot achieve their professional goals unless they write their correspondence, reports, and documentation with power and precision.

- Creating documents as engineered information products
- Eliminating common errors and time-wasters
- Writing for *nontechnical* readers

Preparing English Tech Documents for International Readers

Although customers and clients around the world read English quite well, it is still necessary to edit international technical information for the E2 reader.

- Making documents *culture-free* and *culture-fair*
- Correcting problems of style, idiom, and syntax
- Using controlled English
- Adapting to local sensitivities and cultures

Effective Quality Manuals/ Usable Procedure & User's Manuals

A manual is a device that supports people in their work; when well designed, it teaches procedures, enforces standards, and saves money.

- Documenting ISO 9000 and other quality standards
- Replacing unreadable and unmaintainable prose with scripts, tables, and diagrams
- Testing for usability and enforceability
- Designing modular, maintainable publications
- Storyboarding and project management

Introduction to Usability & Usability Testing

Usability is a central source of competitive advantage in the design of products and systems.

- Concepts of *Usability*
- Testing for ease of learning and use
- The SMART method for usability objectives: **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**ime-Based

The Craft of User Requirements & Functional Specs

Those who use information technology and those who create or acquire it must communicate their needs and expectations clearly, especially at the beginning of the design cycle.

- How **User:Developer** communication fails
- Beyond the Waterfall Model
- Tools and processes for functional specification

Organizational Communication

- Meetings that Work** Meetings should be energizing and productive—never boring or a perceived waste of time.
- Objectives and agendas: staying on message
 - Two warring cultures: ratification vs. exploration
 - Roles and games played by participants
 - Secrets of master facilitators
 - Cultural variables in international meetings
- There's Only Now: Managing the Professional's Time** Despite the array of electronic time management tools, too many professionals feel overworked, stressed, and never quite on top of their work.
- Attitudes about time
 - Five immutable rules of time management
 - Time management traps and how to avoid them
 - Products and tools and how to choose/adapt them
 - Getting long-term goals and projects into your short-term calendar
- Raising Culture Consciousness** An urgent need for international business professionals is to learn, and adapt to, the culture of the communities or countries where they wish to do business.
- Dimensions of difference
 - Typical “ugly American” assumptions and mistakes
 - Culture shock and the stresses of international business
 - Context and communication
 - Individualism versus collectivism
 - Timing and pacing (the hidden dimension)
- Turning Words into Money: Business Plans & Cases** Projects need funding, capital; even the best ideas can fail for lack of a convincing business plan/case.
- What impresses funding sources
 - Missions, visions, and goals
 - The logic of the ‘business case’
 - Clear, persuasive language and graphics
 - Presentations for executives and sponsors

Speeches/Short Programs for Professional Gatherings and Meetings

How to Sell an Idea

Why won't people follow your advice? There are eight barriers that keep us from accepting new plans and approaches... and specific techniques to overcome them.

The Secret of Professional Fulfillment

The key to mental health and productivity—on the job or at home—is *equilibrium*: keeping all of life's eight competing values in balance. The tendency is to neglect some while pursuing others, a practice that leads to anxiety and alienation.

Re-Inventing the Memo

Do you have trouble getting your point across to co-workers? A memo is NOT a work of literature, but, rather, an engineered product, designed for clarity, power, and speed. Twelve tactics increase the chance that a memo (or an e-mail) will be read.

The Odor of Mendacity—Why People Don't Believe You Anymore...

In school, we learn ways to "improve" the truth by puffing up our writing with words that inflate, obscure, and disguise. Business and professional speech and writing are filled with these bad language habits, which make us sound as though we are hedging and evading—even when we have nothing to hide.

Does Grammar Count in the Era of E-Mail?

Is e-mail the end of 'correct' communication? Do spelling, punctuation, and grammar matter anymore? Only as much as the recipient of the message matters. All professionals should care about the image they communicate, even in their informal messages.

Business Basics for Technical Professionals

The most important technical question is "How's Business?" Technical professionals must learn to pitch improvements and changes in their departments through business-savvy business cases: proposals aimed at one's own management. Business cases must show how the new procedures or technology will either make or save money, and within an acceptable number of months.