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THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION

February 2009

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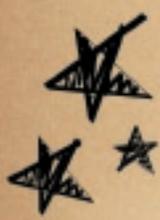
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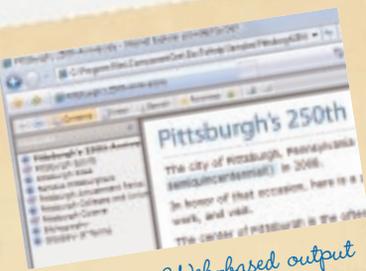
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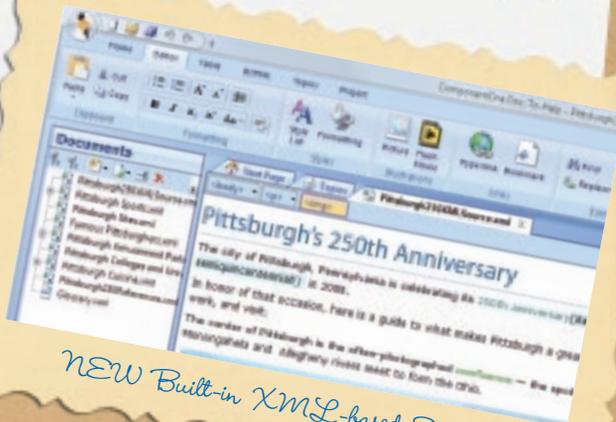
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Intercom (ISSN 0164-6206) is published 10 times a year (monthly, except for August and October) by the Society for Technical Communication, 901 N. Stuart St., Suite 904, Arlington, VA 22203-1822, a nonprofit educational organization, as a service to its membership. Membership in STC includes a subscription to *Intercom*. Periodicals postage paid at Arlington, VA, and additional offices.

Postmaster: Send address changes to *Intercom*, Attn: Dept. 207, c/o Society for Technical Communication, 901 N. Stuart St., Suite 904, Arlington, VA 22203-1822.

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Intercom, the magazine of the Society for Technical Communication, is published to provide practical examples and applications of technical communication that will promote its readers' professional development.

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Technological advancements increasingly shape the delivery of information because they shape how we communicate to and with others in the process of creating a range of technical content. Ensuring that the information developed is useful to consumers often depends on effective collaboration, which literally means working with others. Yet many writers are accustomed to owning their own books and performing every task related to developing a piece of writing—and for good reason; writing traditionally has been considered a solitary task. With the growing appeal of single sourcing, technical writing requires effective collaboration among writers who must team up to create content that can be integrated into various information types. Moreover, contemporary distributed work settings have increasingly prompted a reliance on virtual collaborative technologies (such as instant messenger, email, and web conferencing), all of which facilitate virtual teamwork even when individuals are co-located.

BY CHARLOTTE ROBIDOUX, *Member*, AND BETH HEWETT

Is There a Write Way to Collaborate?

The question thus arises, how do writing teams make the best use of complex technology—not only single-sourcing tools (such as XML, DTDs, and content repositories) but also tools that support virtual collaboration? The available options can be confusing enough that writers, so at ease with the written word, often favor what is tried and true, such as email. Indeed, email is an easy choice whether writers in a team sit in nearby cubes, in separate offices, or across the country. Combining various modes of communication—such as online project workspaces and discussion boards—with email can streamline communication and thus facilitate collaboration. If writing teams are to succeed in single-sourced, virtual environments, they need to master the art of collaboration using available virtual tools efficiently. To this end, we consider the functional principles underlying various tools and how understanding those principles can help team leaders choose virtual tools for efficient and effective collaboration.

The Nature of Collaboration

“Collaboration” is quite the buzz word these days—in large part because it is necessary to complete much virtual work. Thus experts are avidly researching what enables teams to collaborate effectively, analyzing everything from the interconnectedness in nature, so-called “bioteams,” to understand collective intelligence and interactions among jazz musicians to understand group structure and improvisation.

Collaboration can be understood as strategic and generative interactivity among individuals seeking to achieve a common goal. Such goals include solving problems, sharing knowledge, and advancing discovery. Considering how to improve collaboration entails understanding why efforts to collaborate may fail. Reports, like the one published in the Economist Intelligence Unit, have identified certain causes of ineffective collaboration, including:

- Insufficient culture that promotes and/or rewards staff
- Lack of trust among team members or between staff and managers

- Insufficient leadership within the team
- Too few measures to track and promote effectiveness of collaboration
- Information overload, such as 50 to 100 email messages per day per employee
- Lack of formal processes for implementing technology effectively

The final cause listed above—that of needing formal processes for implementing technology effectively—is especially important because much effort and time can be wasted by using the wrong technology for a given goal. Formal processes are enabled when team leaders know which virtual collaborative technologies to choose and why they are best for particular scenarios. First, leaders need to ask key questions that can help to determine their goals for the collaboration. Second, they need to decide which virtual collaborative technology(ies) might best meet those goals. The rest of this article is designed to help team leaders with those two tasks.

Outlining specific goals for virtual collaboration is necessary to ensure that



writing teams can employ the best functionalities of face-to-face interactions in their virtual settings. Along these lines, then, key questions arise that can help the team set goals for their collaborative writing projects. These questions yield information about the characteristics of the team and what tools might work best for the upcoming project.

- What are the goals of the collaboration?
- Who are the team members and where are they located?
- What does the technology need to do in order to support the goals?

Responses to these questions, as the example case at the end of this article shows, provide valuable information for selecting tools that will enable the success of team-based projects.

Enabling Face-to-face Collaborative Activity with Technology

In a face-to-face setting, writing teams have fewer choices but greater familiarity with how to collaborate. They rely on spoken language, written text, as well as facial cues and body language to communicate. Some of the collaborative activities that we expect in face-to-face situations include:

- Listening, responding, and clarifying points in person
- Looking for cues that strengthen relationships and build trust
- Brainstorming on whiteboards or flip charts
- Deliberating over a problem on the way to lunch
- Sharing the same object of attention
- Demonstrating or presenting a point using technology and gestures
- Finding common ground and seeing eye to eye
- Contributing to the project by handing someone a document
- Performing an assigned role alongside others
- Sharing ideas and writing and editing together
- Gauging a teammate's expression and reaction to your work

When the work goes virtual, digital tools function to enable the ease and apparent efficiency of face-to-face col-

laboration. For example, insofar as it is important to build relationships within teams in face-to-face settings, it is even more important to build relationships in virtual settings because of obvious losses of facial cues and body language. The question emerges: What functionalities of virtual collaborative technologies enable particular work-based interactions?

Representations of Virtual Collaborative Technologies

Structured representations of collaborative technology can be useful for deciding what tools to use when planning writing projects. In Table 1 and Figure 1, we provide two views of the technology in terms of four functional characteristics, which differentiate how the quality of communication will change depending on the technology selected. The first view takes the form of a matrix; the second, the form of a diagram; and both use the four characteristics that Hewett and Hewett identified as underlying principles of virtual collaborative technologies.

1. *Presence awareness* has to do with whether participants in a virtual interaction know who is present or available to communicate. Usually, instant messenger software provides a status of each participant's name and activity level. Overall, presence awareness gives team members a genuine sense of immediacy regarding the relative availability of others with whom they may need to collaborate.
2. *Synchronicity* concerns the temporal nature of virtual collaborative technology. Asynchronous communication, or non-real time, has a time lag between when it is written or spoken and when it is received by other participants. Synchronous communication, which can be either near-real time (e.g., instant messaging) or real time (e.g., whiteboards where participants can watch each other type or edit a document), has little to no time lag; a person's immediacy makes the interaction more like face-to-face, oral conversation. Interestingly, the greater the synchronicity, the higher the presence awareness.

3. *Hybridity* concerns to what degree the communication combines elements of spoken and written language. Virtual collaboration tools that are more like face-to-face interactions will involve (1) spoken language (e.g., telephone/video conferences) or (2) written language with a sense of dialogue and open-endedness (e.g., instant messaging). Unless oral conversation or instant messaging is involved in the communication, email messages that send edits back and forth are not considered hybrid. In some cases, greater hybridity might be more useful for developing and completing a writing project.

4. *Interactivity* has to do with whether the participants in a virtual project can cross the interpersonal distance that the virtual collaboration creates. It is easy to be interactive with someone in a face-to-face setting, but working together via the computer creates both a spatial and an interpersonal distance that must be overcome in order to do the work together. The more interactive the technology, the more feedback among participants is enabled and face-to-face purposes can be accomplished.

Presence awareness and synchronicity can be seen as relating to temporal aspects of collaborating virtually; hybridity and interactivity pertain to the spatial aspects of interacting—approximating the experience of being face-to-face. In the matrix below, these four characteristics are juxtaposed against particular virtual collaboration tools and the overarching reasons, or purposes, for using that particular technology in different contexts.

To use this matrix (see page 7), a team leader would consider first the goals for the collaboration, the characteristics of the team, and what the technology needs to do to support the goals and the team. Second, she would identify the available virtual collaborative technologies that might address those needs. In so doing, she could determine whether the functionalities of presence awareness, synchronicity, hybridity, and interactivity for those tools combine to support the overall purpose of the interaction.

Table 1. A Matrix of Virtual Collaborative Technologies

Technology	Presence awareness	Synchronicity	Hybridity	Interactivity	Purpose
Web and audio conferencing	<ul style="list-style-type: none"> High certainty of a person's availability when participant is logged into the software Participation expected when planned 	<ul style="list-style-type: none"> Synchronous As scheduled and variable response time for spontaneous interactions One-to-one or one-to-group interaction 	<ul style="list-style-type: none"> Combines spoken and written text 	<ul style="list-style-type: none"> Feedback highly likely, yet depends on the relationship and roles of the participants 	<ul style="list-style-type: none"> To enhance team and one-on-one meetings To present data or demonstrate a point To reinforce team identity, listen, respond, build trust To meet spontaneously to address issues, plan, solve problems, build relationships, address differences in opinion
Audio conferencing	<ul style="list-style-type: none"> High certainty of a person's availability when callers join the call Availability and participation expected when call is planned Unplanned calls have less predictable availability 	<ul style="list-style-type: none"> Synchronous As scheduled and variable response time for spontaneous interactions One-to-one or one-to-group interaction 	<ul style="list-style-type: none"> Primarily spoken May include shared, written text via another technology (such as previously emailed documents) 	<ul style="list-style-type: none"> Feedback highly likely, yet depends on the relationship and roles of the participants 	<ul style="list-style-type: none"> To manage progress with team and individuals as appropriate To listen, respond, build trust To meet spontaneously to address issues, plan, solve problems, build relationships, address differences in opinion
Instant messaging, one-to-one or one-to-group (chat)	<ul style="list-style-type: none"> High certainty of a person's availability when participants are logged in and "active" A first mode of communicating about an issue 	<ul style="list-style-type: none"> Synchronous, minimal lag time One-to-one or one-to-group interaction 	<ul style="list-style-type: none"> Written text with some facets of oral speech (casual expressions) 	<ul style="list-style-type: none"> High degree of feedback anticipated 	<ul style="list-style-type: none"> To engage in spontaneous, informal dialogue To clarify, question, respond Springboard for other modes of collaboration
Discussion boards	<ul style="list-style-type: none"> Status of a person's availability is typically unknown Participation expected eventually 	<ul style="list-style-type: none"> Variable response time but primarily asynchronous One-to-group interaction 	<ul style="list-style-type: none"> Written text with some facets of oral speech (casual expressions) 	<ul style="list-style-type: none"> High degree of feedback anticipated 	<ul style="list-style-type: none"> To facilitate formal, deliberate decision making about a specific subject To document information about a complex issue To distribute information equitably among all team members To seek input about issues needing resolution or clarification for two or more team members
Online project workspaces	<ul style="list-style-type: none"> Status of a person's availability is typically unknown Participation expected eventually 	<ul style="list-style-type: none"> Variable response time but primarily asynchronous One-to-one or one-to-group interaction 	<ul style="list-style-type: none"> Primarily written text 	<ul style="list-style-type: none"> Feedback depends on the roles and the relationships of the participants 	<ul style="list-style-type: none"> To post project-related documents, processes, guidelines, instructions To issue organization-wide announcements To manage group schedules
Wikis	<ul style="list-style-type: none"> Status of a person's availability is unknown Participation expected eventually 	<ul style="list-style-type: none"> Asynchronous One-to-one or one-to-group interaction 	<ul style="list-style-type: none"> Written text with some facets of oral speech (casual expressions) 	<ul style="list-style-type: none"> Feedback depends on the roles and relationships of the participants 	<ul style="list-style-type: none"> To post and collectively edit documents
Email	<ul style="list-style-type: none"> Status of a person's availability is unknown Participation expected eventually 	<ul style="list-style-type: none"> Asynchronous One-to-one or one-to-group interaction 	<ul style="list-style-type: none"> Written text, often carefully composed and edited 	<ul style="list-style-type: none"> Feedback can be unpredictable, particularly with larger distributions 	<ul style="list-style-type: none"> To notify, ask/answer simple questions To create a record of actions To alert team of developments and location of new content
Listserve	<ul style="list-style-type: none"> Status of a person's availability is unknown Participation expected eventually 	<ul style="list-style-type: none"> Asynchronous One-to-group interaction 	<ul style="list-style-type: none"> Written text, often carefully composed and edited 	<ul style="list-style-type: none"> Feedback can be unpredictable, particularly with larger distributions 	<ul style="list-style-type: none"> To notify, ask/answer simple questions To create a record of actions To alert team of developments and location of new content
Internet/ Intranet sites	<ul style="list-style-type: none"> Status of a person's availability is unknown Participation expected eventually 	<ul style="list-style-type: none"> Asynchronous One-to-group interaction 	<ul style="list-style-type: none"> Written text, often carefully composed and edited 	<ul style="list-style-type: none"> Feedback fairly static and depends on the roles and relationships of the participants 	<ul style="list-style-type: none"> To provide information about the writing organization for other departments or for outside organizations

Of course, this matrix also raises issues to consider. For instance, just as with planned audio conferences, those that are unplanned can be extremely helpful in the process of building and maintaining relationships and resolving problems. However, while such calls assume a greater certainty of availability and presence than email, for example, availability and presence awareness do not always mean having someone's complete attention. Some team members may be available but distracted or disinterested. These kinds of interpersonal issues will always be part and parcel of any virtual collaboration and must be addressed on a case-by-case basis.

A Diagram of Virtual Space and Time

To use this diagram (also termed as a pay-off matrix) of virtual space and time, team leaders would again need to determine their goals, the character-

istics of their team members, and what the technology must do to support their goals. A quick glance at the diagram can help the team leader see whether the available technologies might meet those goals. For example, in the top left quadrant, the combined web/audio conferencing technology offers the greatest option for team members to feel like they are face-to-face. Instant messaging allows the team to query each other to determine whether a web/audio conference is needed. Both of these tools provide a sense of working interactively in real time.

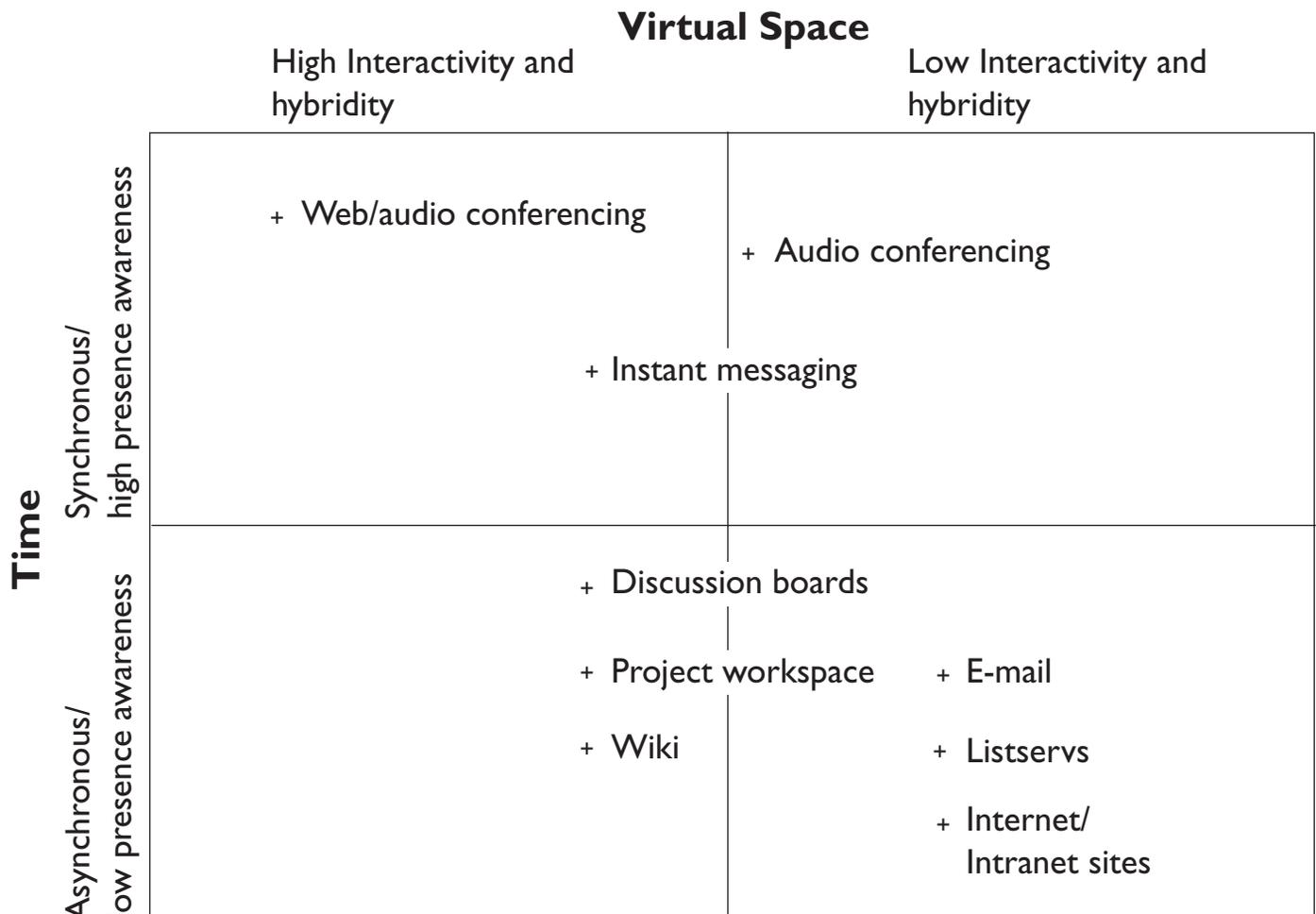
In the lower right quadrant are tools with lower levels of real-time interactivity. In fact, email does not emerge at all as being a highly collaborative tool. Throughout the duration of a project, team members can review this diagram if collaboration seems diminished to verify what tools are dominating and to make mid-course corrections as needed.

Implementing Collaborative Technologies: A Case Example

Developing a collaboration plan for a single-sourced project depends, among other things, on understanding the size of the team and the scope of the project. Teams comprised of two or more people must consider how tasks will be coordinated to ensure maximum efficiency and functional deliverables. The larger the team, the greater the need for effective collaboration. When developing a collaboration plan for any documentation project, it is important to consider the strengths and weaknesses of the team members and the scope of the project.

For example, consider a team that is responsible for updating hardware and software documents within four months. The work will entail adding or modifying the content that relates to new features. Typically there are over 15 separate documents associated with

Figure 1. Quadrants of Virtual Space and Time



a project. For this project, the team will be short-staffed due to other projects and deadlines. To help this team collaborate virtually, the leader can ask herself key heuristic questions:

- *What are the goals of the collaboration?* The goals are to brainstorm, make decisions, assign team members to the appropriate roles and tasks, solve problems, build new relationships, and complete the task within a given timeline.
- *Who are the team members and where are they located?* There are four writers, a project leader, and one editor. One of the writers has no experience with the project. Two of the writers are co-located, while the rest of the team is virtual.
- *What does technology need to do in order to support the goals?* It needs to find a way to facilitate quick decision making, support each team member in his or her role (e.g., posting new information in a central location or making sure the new information is integrated into a deliverable), enable frequent and immediate communication, and notify team members that information has changed.

From these questions and answers regarding virtual collaboration, and using either the matrix or the diagram provided above, the team leader should be able to make choices among available technologies to meet the team's needs. *What collaboration tools will enable success on the project?*

- Employ tools that shorten the temporal aspects of collaborating and expand the spatial ones early in the project and at periodic intervals throughout the project. Doing so will help the team ramp up and make decisions about roles more quickly. These tools include:
 1. Web/audio conferencing for topics that need more hybridity and interactivity to illustrate complex points and demonstrate new concepts.
 2. Web conference interactive tools to enable the team to brainstorm and vote on new ideas, establish roles and responsibilities, and run surveys to poll team members on specific issues.

3. Audio conferencing at regular intervals in order to address questions and issues that arise. Given the common reliance on email, it is important that team members choose to pick up the phone to ensure a vital connection especially when an email string seems to add rather than remove confusion.

4. Instant messaging for frequent opportunities to clarify issues quickly, ensure efficient use of processes, and notify key players of new information.

- Promote one-on-one web/audio conferencing for existing writers to establish a strong relationship with the new writer throughout the project.
- Document agreed-upon processes and post them along with new information about the project on a designated workspace.
- Post drafts of new content on the wiki for the team to review and approve.
- Post all questions that impact the whole team to the discussion board. Require all team members to provide feedback and to activate discussion board alerts.
- Provide status updates on instant messenger for team members to gauge when quick communication is possible and when focused time is needed to concentrate.
- Encourage team members to review the collaboration diagram regularly if collaborative interactions seem diminished.

Conclusion

A formal collaboration process becomes a more manageable task if we delineate fundamental aspects of the technology. Whether the project concerns product documentation or XML style sheet development, project leaders can ask questions that highlight key attributes of team members and the scope of the work to optimize team synergy. While there is no “magic bullet” tool that can guarantee a cohesive team, effective collaborative experiences are more predictable with a sound methodology for communicating and collaborating, both of which support the delivery of content that has value for customers. ❶

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WHAT IF READERS

Can't Read?



BY TONY SELF

This article discusses the different reading styles of the emerging generation of workers and the changing reading patterns of existing generations.

The Reader Is King

As technical communicators, we claim to be user advocates. We claim to keep the reader uppermost in our minds when we are writing; the reader is king. We might even use the mnemonic PAD to remind ourselves that thinking of purpose, audience, and delivery is the key to good communication practice.

If we really do believe in the importance of the audience, the reader, the user, then how have we changed our practice to reflect the changing characteristics, competencies, and even literacies of our readers? Have our readers changed over the past few years? The evidence points to the answer being a resounding “Yes”!

Reading Has Changed

What evidence do we have? To start with, all major newspapers with a web edition now have more online readers than traditional (paper) readers. *The Age*, a Melbourne newspaper, has close to 1 million readers of its paper edition, but 1.5 million web readers (http://about.theage.com.au/view_article.asp?intid=63).

A study by Springer (www.springer.com/cda/content/document/cda_download_document/eBooks++the+End+User+Experience?SGWID=0-0-45-608298-0) found that eBooks have begun to make strong inroads into the areas of research and academic work. When individuals use eBooks, they are usually engaged in “horizontal information seeking” and “power browsing”—in other words, they skim quickly through

the reading material and bounce from source to source.

By research, Springer was referring primarily to use within universities by students and academics (www.masternewmedia.org/ebooks_usage_trends_and_statistics). As an example, at the University of Illinois at Urbana-Champaign, 78 percent of users said they use eBooks for research, while 56 percent reported using eBooks for study. (Only 10 percent mentioned using eBooks for teaching or leisure.)

Of course universities don’t accurately reflect the broader workplace. But university graduates make up the bulk of new information workers. We often write for the LCD (the lowest common denominator): the inexperienced and least knowledgeable of our readers.

The New Readers

If university students today are the workers of tomorrow, then they will soon be the readers of our manuals, user guides, procedures, and user assistance. What sort of readers are these new readers?

A self-survey of digital ethnography students at Kansas State University found that the average student, in one year:

- Bought textbooks worth \$100, but never opened them
- Read 8 paper books
- Read 2,300 web pages
- Viewed 1,281 Facebook profiles

- Wrote 42 pages of assignments
- Wrote 500 pages of emails

The fundamental shift away from traditional forms of written communication (books and documents) to new media (email, social networking, collaboration spaces) is something to which we as technical communicators should be attuned. The shift is not just from paper to online media; the shift is also away from top-down, autocratic communication structures to democratic, peer-to-peer structures.

Literacy Is Changing

The modes of human communication are changing. Language rules are changing. Literacy is changing. Some people think that the “problem” with young readers is rooted in a decline in emphasis on spelling and grammar. But the problem is not poor spelling and grammar; the problem may be an undue emphasis on its importance.

In 2004, Jo Carr, a sociolinguistics lecturer at Queensland University of Technology, wrote: “rules used to be an indication of social class and literacy in the past, but [members of] to-



Figure 1. Sony eBook Reader

day's society are doing things differently because language today serves the purpose of speed and social interaction." Sue Butler, of the respected Macquarie Dictionary team, suggested that we dump the apostrophe altogether.

Since 2006, New Zealand high school students have been permitted to use "text speak" in national exams (www.dotcult.com/Txt_Spk_OK_in_NZ). Their answers must clearly demonstrate the required level of understanding, but they can use a language that some older folks might find difficult to recognize as English! For the uninitiated, text speak is an abbreviated form of spelling that aims to use the fewest number of characters needed to convey a comprehensible message. Hence, punctuation, grammar, and capitalization rules are largely discarded.

Georgina Dimopolous, a 19-year-old Melbourne University student writing in *The Age*, pointed out that "provided young people effectively communicate information, an SMS message or an MSN conversation may be *just as legitimate as an email or an essay*." Since when has email been as "legitimate" as an essay?

It's no use arguing about it. That debate is done and dusted. Nineteen-year-olds about to enter the workforce see email as legitimate (i.e., formal and authoritative). Authority of information is more likely to be conveyed by currency (its up-to-dateness) than by providence (who wrote it) or packaging (what form it is presented in).

An Australian National Report on Schooling found that 11 percent of year seven students lacked basic reading skills, and 20 percent do not meet numeracy benchmarks. While only a few students will be unable to read by the time they reach the end of their secondary education, a significant proportion will have quite different reading abilities than a generation earlier. How do we write for our readers if our readers can't read traditional documents?

Playing to the Reader's Strengths

One solution may be to allow young people the opportunity to play to their technological strengths.

My neighbors have two daughters; Megan is 22, and Leonie is 15 (I have

"We've read the manuals" branding on a Gizmo company car.



changed their names). When Megan was 15, just seven years ago, her parents had a second telephone line installed. Megan seemed to be always talking on the phone; she was a stereotypical teenage girl. But that stereotype is no longer valid. Leonie never uses the phone line. She does have a mobile phone, but she tends to use it primarily for texting. Rather than chat to her friends on the phone after school, Leonie will chat using MSN. Talking on a telephone is no longer typical of a modern teenage girl.

My neighbors are not unusual. In Britain, the average person sends 28 text messages per week, but only makes 20 telephone calls. That's the average across all age groups in the entire population. In the Philippines, an average of 15 text messages are sent per person per day. In New Zealand, one mobile phone plan provides a cap of 2,000 messages per month, which some young people need in order to limit their texting. Two thousand messages per month is 67 per day, almost 3 per hour, or 1 every 20 minutes, 24 hours per day.

Literacy Is Different

My teenage daughter stayed with her grandparents for a few weeks. I told her

to make sure she let her grandfather know when she was on the train every day; she naturally chose to communicate by text message. However, not only did her grandfather not know how to receive text messages on his phone, but he also did not know how to read them. My daughter was shocked to realize that her grandfather was functionally illiterate.

The web-literate entrants to the workforce are not stupid, and they're certainly not illiterate. They have a different literacy. According to a 1998 study by Cetron, children encounter as much information in a single year as their grandparents did in an entire lifetime. Of particular relevance to technical communicators is the finding that these new readers are accustomed to information becoming obsolete and having to constantly update their knowledge. They are also practiced at sharing their knowledge instantly and virtually.

In summary, new readers (some of whom apparently can't read or count!) are our LCD audience. They are using language differently, and they don't use the same communication rules and protocols as earlier generations. They also afford electronic communication an elevated status.

Over-hyped?

If you've reached this point and you feel that this change in reading skills is either over-exaggerated or not significant, consider poor Clifford Stoll. In the February 1995 issue of *Newsweek*, Stoll wrote an article titled "Hype Alert: Why Cyberspace Isn't, and Will Never Be, Nirvana." In the article, he mocked "visionaries [who] see a future of telecommuting workers, interactive libraries and multimedia classrooms. They speak of electronic town meetings and virtual communities. Commerce and business will shift from offices and malls to networks and modems. . . . Baloney. Do our computer pundits lack all common sense? Computers and networks isolate us from one another. A network chat line is a limp substitute for meeting friends over coffee."

Today's reality seemed quite fanciful for such non-visionaries in 1995. The "limp substitute for meeting friends" is an enormously powerful and extravagantly popular tool for connecting people. There are over 100 million users of MySpace, with the average page visited 30 times per day. We've even had to come up with a term to describe that connectedness: social networking.

I earlier quoted from a self-survey of digital ethnography students. Their teacher, Michael Wesch, is a media ecologist. These phrases didn't exist when those students were born, and this phenomenon is bound to continue. Many schoolchildren will go on to work in jobs that haven't been invented yet. (Former US Secretary of Education Richard Riley predicts that the top 10 in-demand jobs in 2010 would not have existed in 2004.) To "google" is now a verb. Things change quickly, and we can't afford to make the same mistakes as Clifford Stoll.

Some More Shocking Facts

Let's now digest a few more shocking facts about the future readers of our documentation (from Karl Fisch, <http://thefischbowl.blogspot.com>):

- China will soon become the number one English-speaking country in the world.
- The US Department of Labor estimates that today's learner will have 10 to 14 jobs by the age of 38.
- One in four US workers has been with their current employer for less than one year.
- The USA is 20th in the world rankings of Internet broadband penetration.
- One in eight couples married in the USA last year met on the Internet.
- There are five times more words in the English language now than there were in the days of Shakespeare.
- The amount of unique new information generated this year will be more than the previous 5,000 years.
- The amount of new technical information is doubling every two years.
- In 10 years, ePaper will be cheaper than paper.
- The One Laptop per Child project will result in 50 million computers per year being shipped to underdeveloped countries, where children will learn to read without ever using paper.
- The percentage of university graduates from India with English language skills is 100 percent.

Old Readers Are Changing, Too

It's not just the young folks whose reading skills are changing. The speed at which information can be retrieved through tools such as Google is causing readers to become impatient. An Akami study in 2006 found that 75 percent of people would not go back to a website that took more than four seconds to load. (A few years earlier it was eight

seconds.) Four seconds equates to 15 words. This might explain why no one reads your documentation.

Was that a bit harsh? I accused you of writing documentation that no one reads. One company betting on that supposition is Gizmo, a computer support company whose slogan is "We've read the manuals."

Are we losing the ability to read? Scott Karp, CEO of Publish2, Inc., thinks so: "I was a lit major in college, and used to be a voracious book reader. What happened? What if I do now all my reading on the web not because the way I read has changed (i.e., I'm seeking convenience) but because the way I think has changed?"

Karp is not alone. Dr. Bruce Freidman, Professor of Pathology at the University of Michigan, found that he has almost totally lost the ability to read and absorb a longish article on the web or in print. "I can't read *War and Peace* anymore. Even a blog post of more than three or four paragraphs is too much to absorb. I skim it."

The phrase "Google is making us stupid" rings true for many people.

Studies back up these anecdotes. A University College London study reported: "It is clear that users are not reading online in the traditional sense; indeed there are signs that new forms of 'reading' are emerging as users 'power browse' horizontally through titles, contents pages and abstracts going for quick wins. It almost seems that they go online to avoid reading in the traditional sense." So it appears that our reading is moving toward skimming information horizontally, or reading snippets of text from different sources, rather than in-depth, vertical reading. Our readers are becoming impatient, and technical communicators need to act!

Reform in Other Communication Fields

Related professions such as journalism have already made some big changes. Many newspapers now feature one-paragraph summaries of



the ten or so top stories, catering to those impatient readers. *The Age* calls its feature Express News; the *New York Times* calls its Shortcuts. The *New York Times* design director, Tom Bodkin, said Shortcuts would give harried readers a quick taste of the day's news, sparing them the "less efficient" method of actually having to turn the pages and read the articles. To survive in the newspaper business, the needs of new readers have to be met. The impatient reader is also causing change in politics (the 15-second grab), in television (shorter news items and shorter current affairs programs), and in many other communication fields where being attuned to the needs of customers is critical to business success.

In Australia, the radio station with one of the oldest demographics is ABC Radio National (RN). This audience is dramatically changing its listening habits. ABC, attuned to the changing preferences of its audience, started offering podcasts for RN programs. By September 2008, a total of 15 million RN podcasts had been downloaded. (Australia has a population of around 20 million.) This number is significant not because of its size (in podcasting terms, that's not a big number) but because of its unexpectedness. If we think the readers of our documents are old readers, not new readers, that doesn't mean we're exempt from changing communication patterns.

Technical Communicators Must Adapt

If technical communicators are still producing hardcopy manuals and stand-alone help systems using current methods in 10 years time, the profession is doomed. To adapt, technical communication must:

- move to topic-based authoring
- embrace minimalism
- use Web 2.0 technologies (XML, mash-ups, wikis, RSS, web services, etc.)
- embrace new media
- adopt heavy-duty single sourcing to improve productivity
- reduce production time (to match the shortening product life cycles and agile software development)

- keep abreast of the change in our readers

More radical changes might be needed, including:

- abandoning the Table of Contents in electronic documents
- no longer including task information for software in user assistance
- using new ways of communicating concepts, such as:
 - graphical devices
 - movies
 - audio
 - animation

Let's look at one of those radical changes: omitting task information. Dr. Mike Hughes, an academic and technical communication visionary, believes that task information belongs in the user interface, not in the user assistance. If a how-to instruction has to be written, the software is flawed. Only conceptual information belongs in the user assistance, according to Hughes.

A successful new communication micro-business is Commoncraft (www.commoncraft.com). On a very low budget but with a high level of skill, the husband-and-wife team have put together clever video explanations of complex technologies. In one short video (under four minutes), Commoncraft explains wikis. This is the type of conceptual information that Hughes suggests is the primary domain of technical communication. It would be easy to argue that the written product of technical communicators is not nearly as effective as Commoncraft-style videos.

Collaboration is an area that we need to focus on as well, particularly for new readers. People prefer to learn from peers rather than from manuals; new readers have lost trust in manuals but not in their peers. Collaboration offers technical communicators a way to facilitate information rather than to create it. This collaboration could be through wikis, mailing lists, and social networking services. We may think the lack of authority of such community-based information is a problem, but new readers see collaborative tools as legitimate.

Writing So That Readers Don't Have to Read

The pressure to change our ways is not only coming from our readers, it's also coming from the top. The expectations of management are changing, and as more metrics and data about information retention become available, the pressure will increase. The self-survey of Kansas State University students mentioned earlier was not communicated through the written word but through a YouTube video. I am confident that I would never have read that important information had it been provided as a PDF. But in video form, the information has been downloaded 2.6 million times! Nobody reads our manuals, but maybe they would view our videos? Could our future Help systems be podcasts? Are we doing the best we can, or are we sticking with the status quo and pretending nothing has changed? As teacher Steven Maher noted in the PBS documentary *Growing Up Online* (www.pbs.org/wgbh/pages/frontline/kidsonline/view/main.html), we have the choice of fighting against change or accepting it as a reality. As user advocates, fighting against the changing nature of our readers doesn't make sense.

The creator of the Information Mapping methodology, Robert Horn, said in 2001: "we have to write so that people don't have to read what we write."

The irony of this article is that only old readers have the ability to read beyond the first paragraph or two. If I were to aim this article at new readers, I'd need an entirely different communication approach. I guess I need to get started on an animated video! 🗣️

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Users as Decision Makers

BY MICHAEL HUGHES, *Fellow*

One of my aha! moments came during a usability test of the online help I had written for a predictive dialer—a device that dials phone numbers automatically then, if someone answers, connects that person with the first available call-center agent. On one of the screens, administrators were to set the *Busy Callback Time*, which I had defined as “the time the di-

aler waits before redialing a line that is busy.” I had specified the minimum and maximum allowed values—0 and 999 minutes, respectively—and even mentioned that users could click an up arrow to increase the value; a down arrow to decrease the value. And, of course, I also told users to click Save to save their changes. When I tested the online help in a usability lab, I was delighted to see

that users actually opened the help topic I had written for that screen. But when the users started reading my help, I learned the following:

- The label *Busy Callback Time* was self-explanatory—everybody got it right away.
- No one wanted to set the value to less than zero. (Apparently time travel buffs don’t work in call centers.)
- No one tried to set a value that was even close to going over the allowed maximum and, if someone had, the system would not have accepted the value.
- Everyone figured out the up and down arrows without my help.
- They figured out the Save button on their own, too.

In the end, users went to the online help with one simple question: “What’s a good number of minutes to delay before calling back?” It seems that was the only thing I had not documented.

I understood then that help should provide domain expertise—that is, help the user make informed decisions when asked to do something on the user interface. It drove home a point shared between me and the technical communications manager for a company that makes home accounting software: “Our challenge isn’t teaching people how to use our software; it’s teaching carpenters how to be accountants.”

This article provides specific pointers and guidelines for how to write user assistance that supports decision making, that is, the kind of help users are willing to read. It shows how technical communicators can add real market value to a product by making the right information accessible to users who know less about a domain than the experts who design for it.

Support for Decision Making

Most users today understand how to interact with standard user interface elements. User assistance for software products needs to focus more on the *user as decision maker*. Whereas traditional help tends to stress comprehensive instructions (see Figure 1), a better strategy is to help the user take informed actions (shown in Figure 2).



Figure 1. Traditional stepped procedure where literal instructions often ignore decision support.

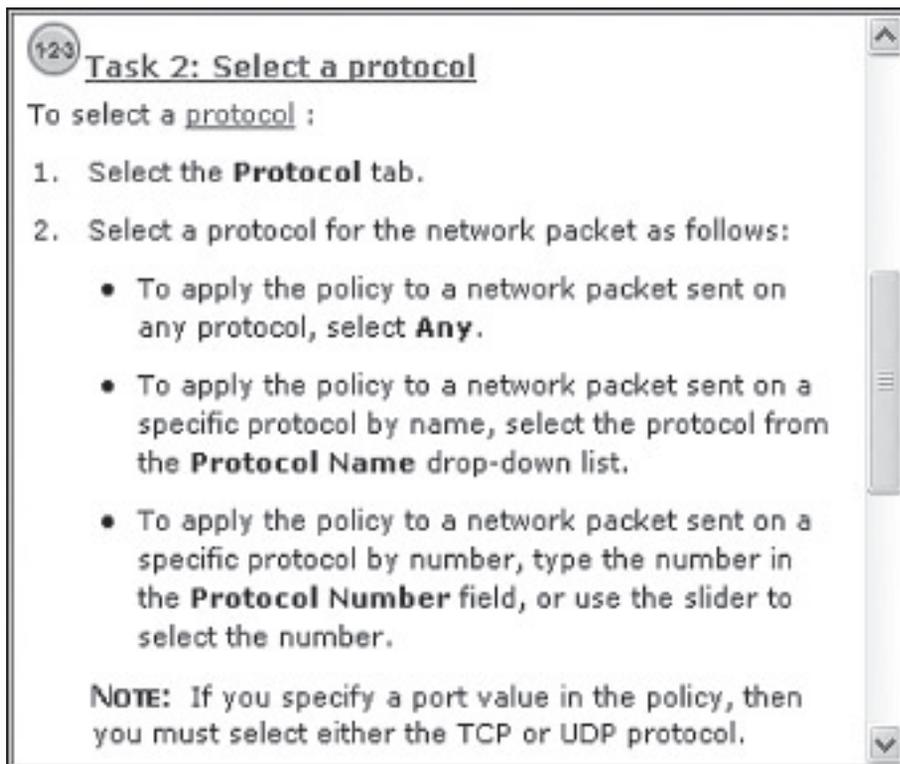
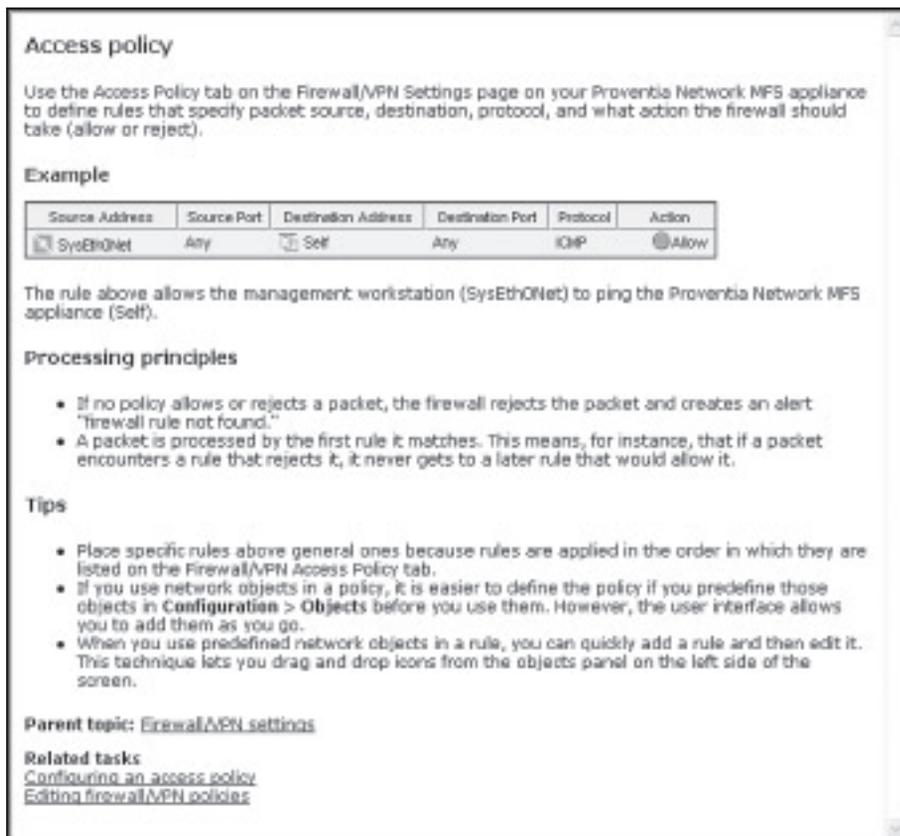


Figure 2. Example, principles, and tips are provided instead of steps.



Documenting User Interface Components

The following guidelines show how to document common user interface components to support decision making.

- **Parameters:** Tell users a good initial value and why they would increase or decrease that value. The following example gives a definition for a parameter called the *heartbeat interval*.

[Product name] uses the heartbeat interval to tell the agent device how frequently to check in for information such as security policy changes. A heartbeat interval set at one hour is appropriate for most installations. If your environment is stable, consider setting the value higher, to check perhaps once or twice a day. If you are testing policy changes, you might want to temporarily set this value to as low as 10 minutes.

- **Check boxes:** Give criteria for selecting or deselecting a feature. Include costs or constraints for having an option on or off, such as frequent server hits or trade-offs in protection level versus performance.
- **Radio buttons and lists of options:** When helpful, compare the options. Figure 3 shows a topic that documents a drop-down list for selecting exchange types for an Internet Key Exchange (IKE) security gateway. Note that in addition to describing the processes, it also compares advantages and restrictions.
- **Text boxes:** Tell users what rules apply (for example, if spaces are not allowed in a text field). It is also useful to let users know how that text will be used, such as, “Other administrators will see this description when they select which security policy to apply.”

Make sure you understand whether a user interface component is asking a user to make a decision or merely asking for information about the user’s environment. For example, a pair of radio buttons that requires a user to select either POP3 or SMTP is not necessarily asking the user to decide what email protocol to use. It might merely be asking what the user already has. “What do you want to do?” scenarios help the user make an informed decision. “What do you have?” scenarios usually do not need help at all.

Figure 3. Help users make an informed choice.

Exchange types

This topic compares the main mode and aggressive mode exchange types for IKE security gateways.

Table 1. Comparison of main and aggressive modes

Aspect	Main Mode	Aggressive Mode
Message exchange process	<ol style="list-style-type: none"> 1. The initiator sends an IKE (Internet Key Exchange) proposal to the responder that contains the encryption and the authentication algorithms for the Phase 1 negotiation. 2. The responder accepts the proposal. 3. The initiator sends a Diffie-Hellman proposal and a nonce value (random number). 4. The responder accepts the Diffie-Hellman proposal and then sends its own nonce value. 5. The initiator sends its proof of identity, which is a certificate or a pre-shared secret key. 6. The responder sends its proof of identity, which is a certificate or a pre-shared secret key. 	<ol style="list-style-type: none"> 1. The initiator sends the IKE proposal for encryption and authentication, starts the Diffie-Hellman exchange, and then sends its nonce value and proof of identity. 2. The responder accepts the security proposal and then sends its own nonce value and proof of identity. 3. The initiator confirms the identity and the exchange.
Advantages	Because the encryption method is established in exchanges 1 and 2, the Diffie-Hellman exchange, the two nonce values, and the identity proofs are all protected from third-party interception.	You do not need to know the IP address of the peer.
Restrictions	To use main mode, the IP address of each party must be known. Therefore, static IP addresses must be used on both the responder and the initiator.	This mode is not as safe as main mode, because the nonce value, Diffie-Hellman exchange, and identity proofs are all sent before encryption begins.

Keeping Users on Task

Often users won't get help because they are engrossed in the task at hand and they see help as an interruption. It's not that they don't want to read, they just see it as something they're not supposed to be doing—they'd rather be working. The following section describes two architectural approaches designed to let users get help while staying on task.

Embedded Assistance

Embedded assistance takes advantage of the user's current focus on the user interface to deliver information at the point and time of need. Embedded assistance elements can be any of the following:

- Field labels
- Button labels
- Hover text (tool tips)
- Instructional text on the user interface

- Examples within or in proximity to text fields
- Pop-ups
- Help panes that are a part of the user interface

Figure 4 shows how user assistance has been embedded directly into the user interface to help the user understand a system check and its implications. Users can drill down to more detailed help through the *Remedy* link if the system alerts them that free disk space is getting low. This technique of *progressive disclosure* lets users get to relevant information easily without overloading them. It puts the users in control of what they read, when they read, and how much they read.

Task-support Clusters

A task-support cluster is a group of help topics that meets the specific information needs of a user who is currently working within the user interface. The user accesses the cluster from a context-sensitive link (a link or button on the user interface screen). A task-support cluster answers the most likely questions first and then lets the user drill down to more information if needed. The goal is to get the user back on task as quickly as possible.

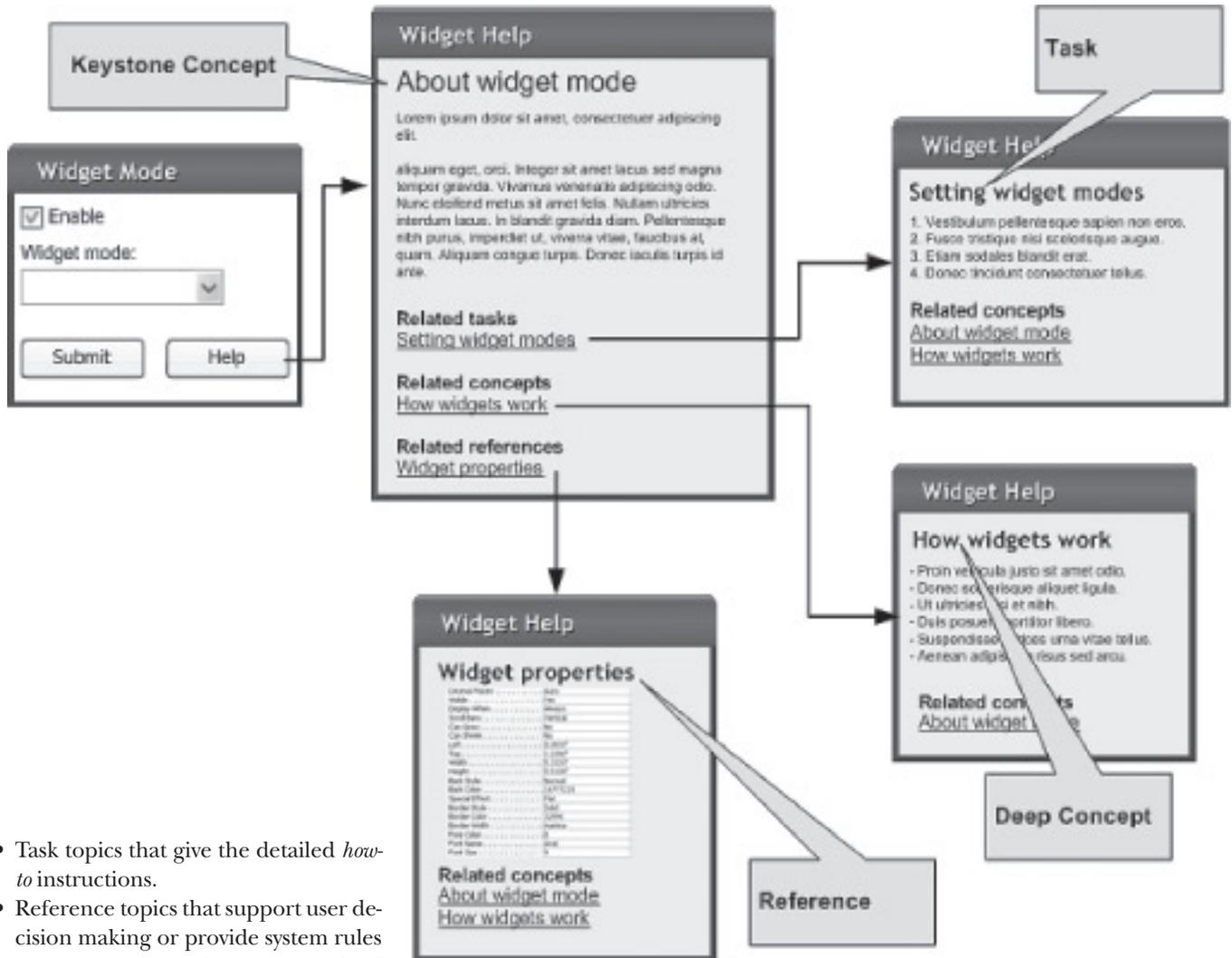
A task-support cluster has the following elements:

- A keystone concept topic that is launched by a context-sensitive link in the user interface. It supplements domain expertise by providing tips or examples that give insight about how to use that screen. Figure 2 is an example of a keystone concept.

Figure 4. Instructional information is embedded directly into the user interface.



Figure 5. Task-support cluster; topic links are self-contained for the task at hand.



- Task topics that give the detailed *how-to* instructions.
- Reference topics that support user decision making or provide system rules or syntaxes. Figure 3 is an example of a reference topic.
- Deep concepts, which are more detailed explanations than the keystone concept and present either more elementary information or more technical information for users who want that additional level of detail.
- Links to other topics within the cluster. Task-support clusters typically should be self-contained (not linked to other clusters). The goal is to get the user back into the user interface as quickly as possible to *complete the task that was interrupted*. For example, a task-support cluster about scheduling reports should not link to topics about designing reports because those topics are not part of the interrupted task. Broad topical relationships such as these are handled better through the help file’s navigation pane—e.g., grouping them

in a book or folder called “Reports.” Putting marginally related links in the topics themselves can confuse users and take them off task.

Figure 5 shows an example of a typical architecture for a task-support cluster.

Conclusion

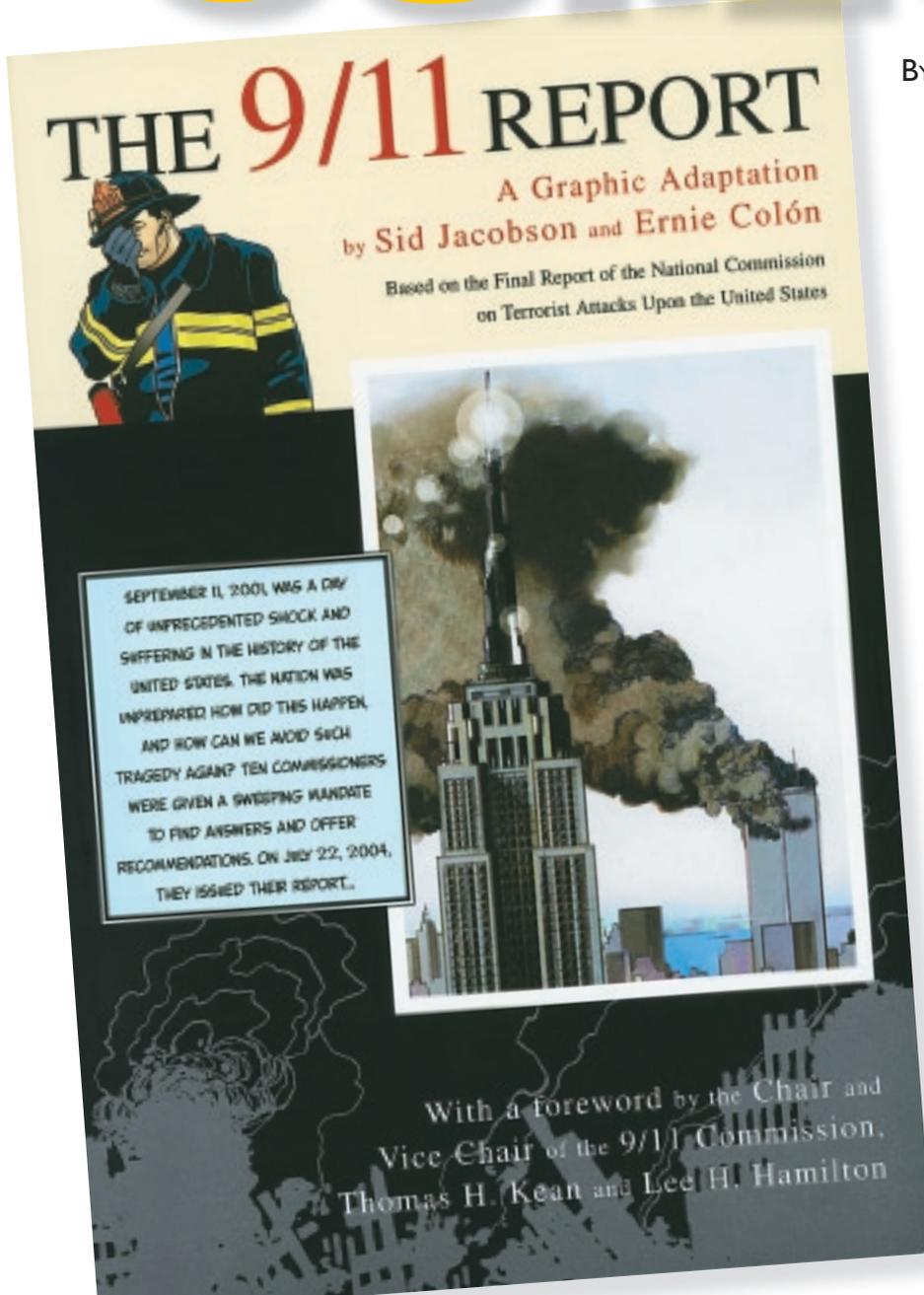
As technical communicators, we have the skills to imbue a product with the ability to transfer advanced domain knowledge to those without the time (or motivation) to acquire that knowledge—and do it at the precise moment that knowledge is needed. We need to capitalize on this ability and promote our position as professionals uniquely qualified to do so. By making our users smarter in how to apply our products to their problems, we make our prod-

ucts more valuable. By helping users set up and operate our products more effectively, we make our products work better. In short, when we concentrate on providing domain expertise and on helping the user make informed decisions, we add market value. And the best part is that we get to write help that people will read. **1**

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What Technical Communicators Can Learn from

COMICS

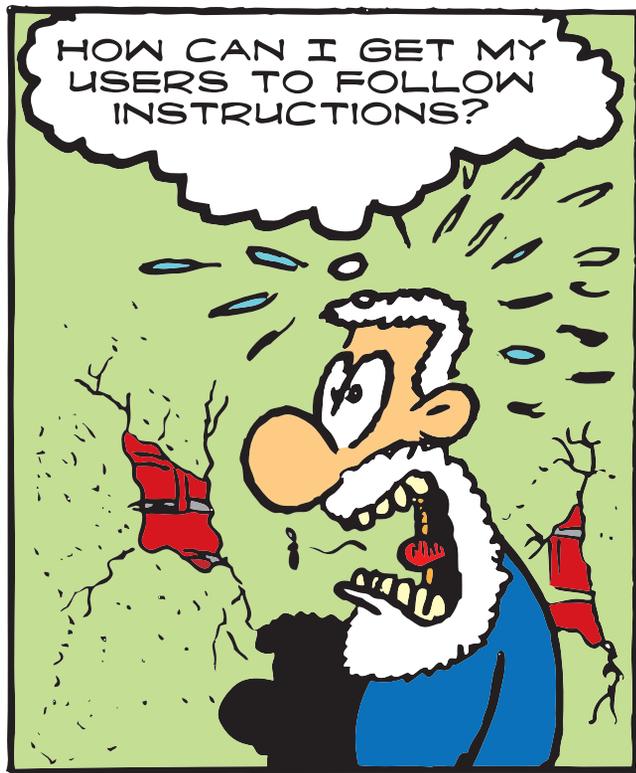


By MICHAEL OPSTEEGH, *Senior Member*

Comic books offer excellent examples of visual communication. Technical communication professionals, from novices to veterans, can learn innovative techniques by studying comic books and looking to them for design, page layout, and communication principles.

First, let's dispel any misconception that comics are kids' stuff. There are many comic books that appeal to mature audiences and tackle a variety of social and political issues. *Dilbert* is an example of a comic that many adults read in the business section of the newspaper every morning. I'll bet some of you even have the *Dilbert* widget for your desktop.

Granted, we read *Dilbert* for entertainment, but there are several examples of comics that communicate complex technical information to readers. By complex and technical, I mean that comics transmit large amounts of detailed information or theoretical ideas. An example of a comic that tackles complex theoretical ideas (and is actually about the theories behind comics themselves) is Scott McCloud's *Understanding Comics*, from which I draw on for this article. An example of a comic that attempts to communicate a lot of sociological, if not emotionally charged, information is Sid Jacobson and Ernie



Colón's graphic novel adaptation of the 9/11 Commission Report. This comic makes oodles of information accessible to readers of all ages and helps readers keep track of that information by making names, events, places, and times more memorable to a reader.

If a picture is worth a thousand words, technical communication could use some of that economy. Considering that Jacobson and Colón's *The 9/11 Report: A Graphic Adaptation* is 144 pages, while *The 9/11 Commission Report: Final Report of the National Commission on Terrorist Attacks Upon the United States* weighs in at a hefty 604 pages, there is something to be said for using comics to hold our readers' attention.

Talk about economical! How does *Dilbert* manage to communicate so much to a wide audience in the span of three panels? Sure, you could dismiss *Dilbert* as not having the onerous task of instructing users through life-or-death tasks, such as operating and maintaining a service rifle in a war zone. No one would ever use a comic to train young troops on using their service rifles, would they? You bet they would! The US Army contracted comic artist Will Eisner to create a manual for the M16A rifle that could

Amplify **WARNINGS** by setting them apart from the rest of your text.

quickly train a diverse group of soldiers on how to use the weapon.

Comics can and have been used to communicate large amounts of complex information to diverse audiences in an economical and meaningful manner. Sounds a lot like technical communication, right?

If we can agree that the rhetorical aims of comics and technical communication can sometimes overlap, then what are the aspects of comics that lend themselves to those rhetorical aims, and what can technical communication gain by taking pages from comics' playbook?

Amplification Through Simplification

Despite the varied styles of art employed by comics over the years, many of us conjure up ideas of simple line drawings when we think about comics. Scott McCloud suggests that we are enthralled by the supposed simplicity of comic art because the simplicity of cartooning amplifies its message. When comic art is simple or abstract, the artist hasn't eliminated detail as much as he or she has amplified certain aspects or features by including them. Often the background images in comics are more detailed while the characters are more simple and abstract. The simplicity of the characters against a detailed background is what draws our eye to the characters.

Technical illustrators have stuck to this same principle also. Technical illustrations are generally line drawings rather than photographs. They favor certain details over others in order to emphasize the important aspects of the object of the illustration and draw the reader's attention to them.

Technical writers and editors can emphasize certain details within instructions, policies, procedures, proposals, and white papers by stating them simply.

Warnings are a fine example of text that should not be bogged down with too many details.

Amplify warnings by setting them apart from the rest of your text.

Making the Invisible Visible

Comics have an uncanny way of making the invisible visible. For example, the shape of a panel, the angle of the drawing, or the ratio of ink to white space can convey such invisible information as emotion, mood, and time. Comics convey a wealth of invisible information using metaphors and symbols. For example, a comic can convey time by the number of panels used to complete an action, smell with a few wavy lines over an open trash can, or anxiety with the use of harsh, jagged line edges.

Technical illustrators use arrows to convey motion, which is visible in life but invisible in still images. They may use dashed lines to show the outline of a hidden part of an object. Illustrators might show a clockface with the hands in different positions to illustrate the passage of time or to give the reader a sense of the time required to complete a task.

Technical writers and editors use their own symbols to make the invisible visible. Those symbols are text, of course. Text is perhaps the most abstract way of conveying information because it bears no resemblance to the objects it describes, but we have agreed upon, more or less, a set of rules that allow us to interpret text symbols. We encode the message by writing, and we decode the message by reading. Writers use language to set the tone, mood, and time. Mood, tone, and time are important to technical communicators because they influence the readers' attitude toward the information, how seriously the reader heeds the warnings, and how successful he or she will be in completing a task or accepting a proposal.

Pay close attention to your language; it sets the mood, tone, and time of your documents.

Chunking Information

By their very nature, comics break down information into manageable, bite-size chunks. Most comics abide

Pay close attention to your LANGUAGE.

by the standard panel format in which each chunk of information is enclosed in a border and separated by a gutter. Even the avant-garde comic artists who try to do away with the enclosed panels and no-man's-land gutters still chunk information—the panels may be gone, but the artist must still show motion and the passage of time. Comics demonstrate that the structure does not matter, but the need for chunking information remains.

Technical communicators must also chunk information into discreet sections in their proposals or discernable steps in their user manuals. Technical communicators, like comic artists, must decide if a piece of information should be one step or two. Should this action take place in one panel or two? Such tools as Information Mapping are available to help technical communicators develop a methodology for chunking information, but reading more comic books may be just as effective.

Chunk your information, simplify your procedures, and use appropriate headings as signposts for your readers.

Should Technical Communication Mimic Comics?

Although I see many more overlapping ideologies between comics and technical communication than I can elaborate on here, I see no reason to use the comic format as the primary means to convey information. Technical communicators are not likely to design a manual on programming a nuclear warhead in the format of a comic because it would be difficult for a comic to convey the gravity of the operation, the nuances of the redundancies built into the operation, or the precariousness of human

life. This is not to say that comics would be incapable, but they wouldn't seem appropriate. Technical documents are often designed so that the user can easily search for information and perform a particular task. Comic books, however, are designed to be read from beginning to end. In a comic-book-style manual, the user would not be able to navigate to the information he or she needed quickly. (I'm imagining a technician scanning the manual panel by panel as the time on the warhead counts down: 10... 9... 8....)

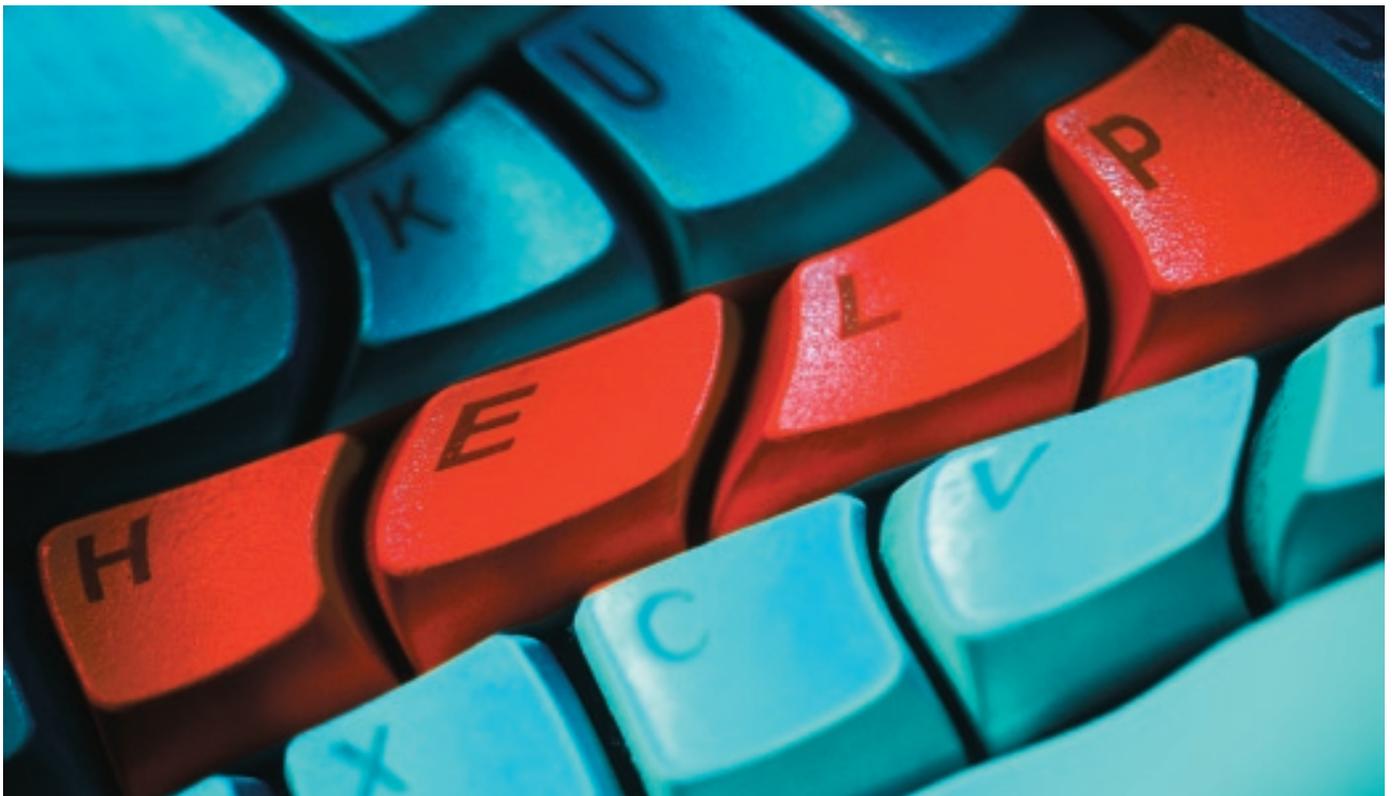
I do argue, however, that comics can teach technical communicators how to relate to diverse audiences. While comics should not become the primary method of our communication, they have a place in technical communication, and Will Eisner's training manual for the M16A rifle is a fine example of how technical communicators can learn from and use comics in addition to other methods. In fact, Google released its new web browser, Chrome, this past September. Chrome sports a comic-book-style manual, in addition to other manuals. The comic manual is drawn by Scott McCloud, the same author (and artist) of *Understanding Comics*. In searching the web for technical communication comics, Google's comic manual is generating a lot of dialogue (both positive and negative) in the blogosphere and in the technical communication world. Furthermore, as the functional literacy of Americans falls lower and lower, technical communicators will see more and more use for comic-book-style manuals. ❶

A version of this article originally appeared in the Orange County Chapter newsletter, TechniScribe.

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SEVEN STEPS

to Successful Online Help with Reuse



By JEANETTE P. EVANS, *Associate Fellow*, AND PAULETTE M. HENNING, *Senior Member*

With the current emphasis on writing for reuse, the use of an effective style guide and metrics becomes increas-

ingly important. An effective style guide brings consistency to drafts and lends itself to reuse while effective metrics provide the resources you need to complete the project on time.

This article builds on our original article (cited in the references below), with additional and updated material on style guides, metrics, examples, and general commentary on reuse.

What Should Go into the Style Guide?

Consider the benefits of using a style guide that emphasizes writing for reuse. Below is an example of the table of contents for the style guide that we developed to support our reuse program at Rockwell Automation. This document can cover the topics of a traditional style guide, but it is written—or, as was done in our case, rewritten—specifically with reuse in mind.

Chapter 1: Writing for Reuse

This chapter focuses on techniques that should be used when you are writing with reuse in mind. For example, writing generically provides guidelines on how to refer to a product in general terms instead of specific terms. This way, the content can be reused for another product if the procedure is the same. For instance, 1734-OB8 is a specific type of I/O module. Instead of writing a 1734-OB8 I/O module, write an I/O module. Other sections in this chapter give guidelines on how to present information so that the content has a consistent voice, which aids reuse.

Table of Contents:

- Writing Generically
- Headings
- Gerunds and Participles
- Capitalization
- How to Introduce Tables, Procedures, Graphics, and Bulleted Lists
- Bulleted Lists
- Numbered Lists
- Numbers
- Commas
- Hyphens
- Cross-references
- Ellipses
- Trademarks
- Vocabulary
- Anthropomorphism
- Active Links

Chapter 2: Using User-oriented Language

Chapter 2 focuses on how to present content in a clear and consistent manner in order to aid in translation and reuse.

Table of Contents:

- About User-oriented Language
- Using the Active and Passive Voices
- Parallelism
- Writing Clearly

- Using the Right Word
- Avoiding Marketing Terms
- Properly Contrasting Terms
- Using Personal Pronouns
- Improving Readability

Chapter 3: Emphasis and Examples

Chapter 3 focuses on how to use emphasis consistently to aid in reuse. If content is presented consistently despite multiple authors who write for different publications, the content can be reused with little re-work because it is presented uniformly in all publications. This chapter directs information developers to limit the use of bold, italics, capital letters, quotation marks, underlining, parentheses, and brackets. Program examples should be presented in a specific font, and the variables in the examples should be emphasized consistently.

Table of Contents:

- Emphasis
- Program Examples

Chapter 4: Writing for a Global Audience

This chapter focuses on making content easier, and therefore less costly, to translate. Examples of some of the topics in this chapter are using short sentences, plain English, consistent terminology, positive language, and avoiding modifier strings, buzzwords, slang, or industry jargon, as well as sentences that end in prepositions.

Table of Contents:

- Writing for Translation
- Global Documentation Guidelines
- Avoiding Common Pitfalls

Chapter 5: Writing Software and Online Documentation

Some of the topics covered in chapter 5 include software and online documentation conventions, such as the way to use the terms *click*, *choose*, *select*, and *press*; how to refer to dialog boxes and menu items; how to handle screen captures; and how to write different types of online help (e.g., procedures, concepts, reference information, and contextual information) with the idea of reuse in mind.

Table of Contents:

- Software Documentation
- Conventions for Software and Online Documentation

- Terms
- Writing Online Help
- Types of Online Help

Chapter 6: Table Guidelines

Chapter 6 focuses on how to give our tables a consistent look. We cover topics such as table titles, table formats, and column headings along with keying standards. For example, we provide direction on how to abbreviate units and how to present content such as ranges, weights, and dimensions.

Table of Contents:

- Table Guidelines
- Keying Standards

Chapter 7: Working with Images

Chapter 7 covers the types of images (line art, screen captures, photos) we use in our documentation and the preferred formats (.eps, .gif, .tif) for these types of images. We also cover image conventions, such as line art guidelines, graphic tiles, and text in graphics. For example, at Rockwell Automation, we try to reduce the amount of text in graphics. Instead of using full sentences, we add circles, arrows, or numbers to direct a user in the graphic. Reducing text in graphics helps to reduce translation costs and to aid in reuse.

Table of Contents:

- Type of Images
- File Formats and Variations
- Making Line Art Print-ready
- Graphic Titles
- Text in Graphics

Appendices

The appendices in the style guide provide guidelines on how to present content so that our documentation has a consistent voice. Documentation that reads like it was written by one author helps aid in reuse of the content. Our style guide has the following four appendices:

Appendix A: Word Use and Unit

Abbreviations

Appendix B: Creating an Index

Appendix C: Worthless Word Checklist

Appendix D: Wordy Wording Checklist

What Metrics Should You Use?

Table 1 provides a sample of how time could be estimated based on metrics that J. Lasecke has collected.

Step 4: Design access and navigation.

Design logical and consistent navigation paths into the help panels and out of the help system so that help is easy to use. This should include a simple navigational model without too many up-front choices.

Step 5: Test and redesign.

Test the help system for any problems (such as broken links or incomplete

content) that might detract from the usability. Ask testers what they think of the help system and how they would improve it. If possible, use both internal (others in the department or company) and external (customer) testers because both types of users tend to focus on different usability issues. However, some usability testing, even if it's simple, is better than none.

Step 6: Review the material.

Review the help panels for usability and consistency. At a minimum, you should schedule three types of reviews: editorial, technical, and peer.

Step 7: Evaluate the results.

Your help system will go through many iterations, prototypes, reviews, and product releases. With each iteration, consider what you can do to improve the system. As much as possible, observe users and conduct surveys to evaluate your system in order to improve the system. Again, working with an information architect as the help system evolves is a great option. ❶

Figure 2. Expanded text can provide quick and easy access to reference material.

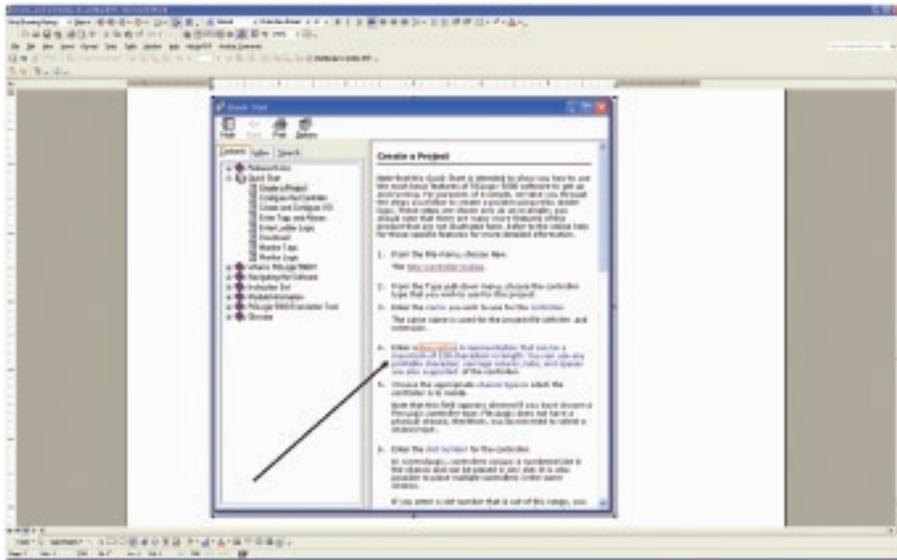
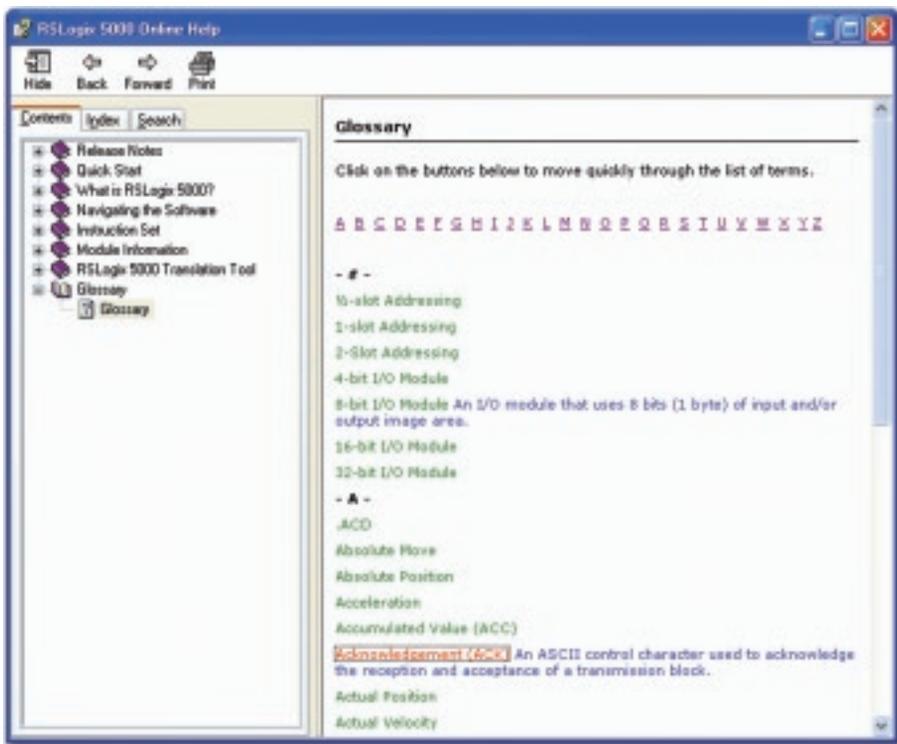


Figure 3. Glossary with navigational cues and expanded text.



Acknowledgments

We want to thank Regina Caldanaro and Michelle Corbin, who worked on the original article, and Chris Rosin and Jonathan Vasko from Rockwell Automation, who provided input on the metrics.

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Are You Helping Your HELP DESK?

Practical Ways for Technical Communicators to Join Forces with Their Tech Support Team

By Jason Butina, Member



How often do you call for help? More importantly, how often do your customers call for help? In many cases—whether we like it or not—it’s easier to pick up the phone than it is to pick up a user’s guide or search a help file. This is especially true if you’re fortunate enough (as I am at my company) to have a top-notch technical support team. Sure, there’s a downside: our work goes unappreciated, and an excellent piece of documentation doesn’t get read. But there’s an upside to those support calls, too. Without spending a dime on usability studies, you have on the other end of the line the most elusive of creatures: a real live user. Create a system that produces open communication between your help desk and documentation groups, and everyone benefits—especially your customers.

Breaking the Ice

If the only time you talk with your tech support team is when something breaks and you, personally, need help, then it

may be time to start taking steps toward more open communication. If you need help breaking the ice, try this: offer help before asking for it. When you show help desk employees that their ideas and feedback will be incorporated into the products you create, they’ll be more willing to share the information they gather in the course of their workload.

Start thinking of your help desk as an extension of your team rather than “just another department.” Attend their meetings and invite them to yours. You could also develop a shadow program where a writer spends a couple of hours on the job with a help desk rep and vice versa. Seeing a person “in the trenches” provides a new appreciation for the work they do and the challenges they face.

Real-world Tips for Working Together

With the right processes in place, you can improve your products, documentation, and service. For example, your developers or engineers are probably already using some form of versioning system to track fixes, changes, and improvements. You can put this infor-

mation to work. In our system, when a customer calls with an idea for improving the product, we enter a Change Request (CR). The CR is typed into the system, and the help desk representative emails the customer a note, saying, “Great idea, we created Change Request XYZ based on your suggestion.” The suggestions are prioritized and many are implemented. Here’s where the technical writer comes in: When the change becomes a reality, you publish a summary of the change in the product’s release notes, and you reference the CR number. This allows customers to see their feedback become a reality.

Our goal as technical communicators is to give users the information they need exactly when they need it. Help desk representatives can help us figure out what information users need most. For example, when multiple customers call about the same issue, we know it’s a hot topic. In the longer term, we can address the issue by improving the product, the documentation, or the training. In the short term, we can make the answers customers need easier to find. In

our company, help desk reps flag these hot topics in our case management software. Our writers' group creates a weekly report and then adds these items in question-and-answer format to our online web knowledge base.

Collaborating with your help desk staff provides many opportunities to help improve the documentation you create. The number and types of support calls they receive can help you determine, for instance, whether you need to clarify instructions in your existing documentation, create new documentation to address specific issues, or provide alternate ways of presenting material, such as tutorials or illustrated examples. The key is teamwork: The help desk shares information with your department, and you, in turn, create resources that help ease their workload.

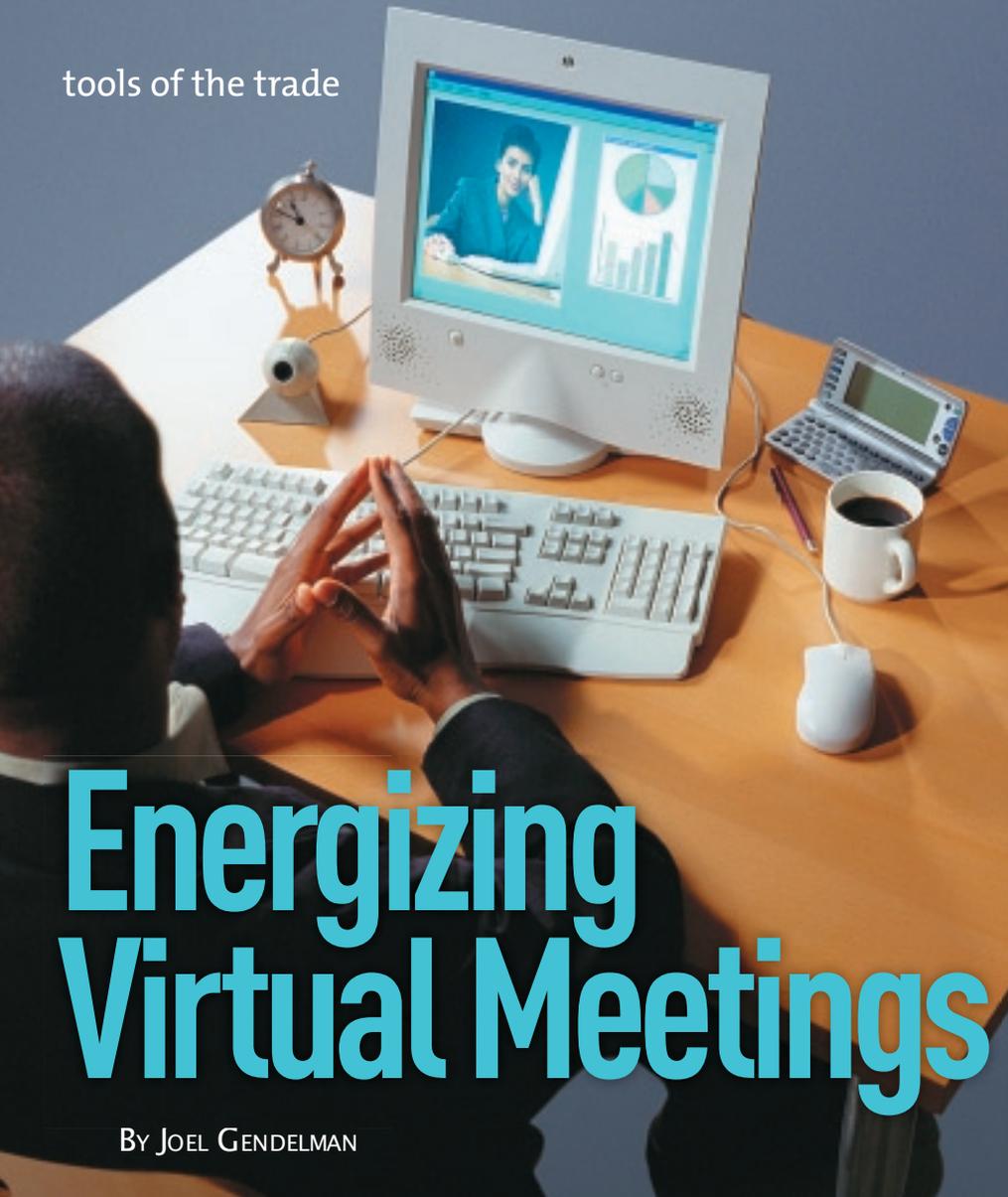
Here are a few examples highlighting how collaboration between help desk and technical communication departments has helped to improve my company's service:

- Based on help desk feedback, we found that many customers were photocopying select pages from larger manuals so they could have "quick references" to these topics. As a service to our customers, we now create quick reference sheets to supplement the full user guides.
- Despite the bold caution in our software installation instructions, customers were missing the important step of backing up their databases before performing an upgrade. At the request of help desk reps, we created a full-sheet caution page that we print on bright orange paper and ship on top of the main installation guide.
- My company works with CAD software that allows a customer to draw and design certain elements many different ways. Calls to the CAD help desk told us that the existing documentation was great as a reference for experienced users with specific questions, but it was not so helpful to new users who were confused about the best way to accomplish their goals. Consequently, we added more illustrated exercises and follow-along tutorials to our guides.
- If a picture is worth a thousand words, then the *right* picture is worth even more. With tools like TechSmith's SnagIt (screen capture software), it's easier than ever for technical communicators to create, annotate, and manipulate software screenshots in documentation and training materials. More challenging than the technical aspect of creating screen captures is creating captures that make sense to the user—in other words, not just a screen but a screen filled in with data that looks like the information users might actually see in their day-to-day interaction with the software. Because tech support staff and trainers work directly with customers as they use our software, we count on them to help us complete our screens with "real-world" sample data.
- Another collaboration my company is just getting started with is combining our deliverables. Trainers and the support team provide free monthly webinar training to our clients. Recently, we purchased tools to record these sessions, edit them for reuse, and produce them as Flash movies. Our writing team includes helpful links to the Flash training from our website. Our user guides, developed by the documentation team, often serve as the source for handouts to supplement the live webinar.
- Every two years, my company holds a software forum in which we invite all of our customers to visit us for several days of training and brainstorming workshops. Creating hundreds of presentations and handouts is too much for a small documentation department, so it's up to the consultants and help desk reps to develop their own materials. However, we provide templates for them to use, which ensures consistency among all materials. We also hold mini-training sessions covering topics such as working with graphics and text. This provides a comfort level to those who are initially frightened by writing and designing. It also minimizes the edits our team needs to make before each session's material is considered "final."
- Our documentation team also helps to support consultants by providing them with templates for email and other customer correspondence. When consultants need to answer a question or reply to a customer who has found a bug in the software, they don't have to create a response from scratch. Instead, they start with boilerplate responses created by our technical writers. In addition to saving time, the templates are designed to promote customer service goals by including service-friendly introductions and conclusions.
- Like many companies, we publish electronic and hard-copy newsletters for our customers. In each issue, we feature "Tech Tips" that help users be more productive with our software. As newsletter editors, we count on the help desk team to provide us with helpful how-to tips based on their experience working with our products and our customers.
- Finally, we've found that help desk reps can be excellent subject-matter experts for our documentation. A developer may be more knowledgeable about what an application *does*, but a help desk consultant is often more knowledgeable about how the application is *used*. This insight helps our writers focus the documentation on our customers' needs.

Win-win

In the end, your help desk team members can be great promoters for your documentation. When customers call with basic how-to questions, support team members can be trained to respond with, "The user guide has exactly the steps you're looking for. Let's find that information together." This approach not only gives the right information right now but also shows customers where to look for answers in the future—in your documentation. **i**

Jason Butina (Jason.Butina@asahq.com) has worked as a technical writer at Applied Systems Associates (aSa) for 12 years. Despite his current job title, manager of multimedia services, he is glad that most days he gets to do more writing than managing. He is a member of the Pittsburgh Chapter STC.



Energizing Virtual Meetings

By JOEL GENDELMAN

Executives of Fortune 100 companies are directing their organizations to conduct more meetings using electronic conferencing software (e.g., Adobe Acrobat Connect Pro, WebEx). Technical communicators are concerned that the limitations of the medium will severely diminish the effectiveness of their presentations. They want to prepare themselves to develop and conduct electronic meetings that are compelling, interactive, and motivational.

I believe that it is not the medium that creates compelling communication; it is the communication strategies used. Electronic meetings have several inherent drawbacks (e.g., lack of visual feedback, more difficult social interaction), but there are also strengths (e.g., the ability to collaborate over great distances unbounded by time). Flexibility and creativity enable technical communi-

cators to duplicate all of the benefits of a physical meeting in a virtual meeting.

To follow are a wealth of ideas that are useful in organizing virtual meetings.

Gain Attention

Begin your virtual meeting with a well-thought-out introduction. Introduce yourself and, if time permits, invite participants to introduce themselves. Ask them to share background information, including professional and personal interests and hobbies. Try posting your picture and, if possible, pictures of participants. Experiment with innovative methods for gathering and sharing participant background information (e.g., matching unique experiences with the appropriate participant).

Establish Relevance

A great way to establish relevance is to poll participants to determine their

background and interest in the subject. It is always a good idea to use a variety of media, such as animations, background information, current events, cartoons, articles, thought-provoking questions, quotes, and stories.

Present Information

In presenting information electronically, use similar multimedia as you would in a face-to-face presentation, but be sure to vary the types (for example, use media such as text, graphics, animations, video and multimedia presentations, illustrations, diagrams, schematics, models, audio presentations, and concrete objects). As with any other type of meeting, it is always important to keep things on track, so consistently refer to the meeting schedule that you presented at the beginning of the presentation and provide content summaries throughout the session. Attention spans can be short in the Internet world, so present information in short chunks and in a logical flow. Be sure to vary the pace and format of your presentation every five to six minutes.

Incorporate compelling communications strategies that include storytelling, guest-speaker presentations, simulations, analogies, homework assignments, case studies, discovery learning, relevant and irrelevant examples, experiments, mnemonics, and games.

As in any powerful presentation, support your main ideas with graphics whenever possible. Using too many colors and fonts confuses people, so keep the format simple, especially if you are using PowerPoint.

Since simplicity is the soul of wit, keep your presentations simple and clear. Tell participants what you are going to tell them, tell them, and then tell them what you have told them. This should be easy, since you have plenty of media to play with. You can set the stage in a multimedia presentation, then present the topic via a whiteboard presentation, and finally review the topic in a discussion using the chat or a polling feature.

Simplify your life by enabling participants to download documents instead of passing them out. Be sure to use PDFs, since they display and print more

predictably than other document formats. Use the whiteboard as you would a flip chart. You may point to, highlight, draw, and notate on the whiteboard. In addition, refer to websites and other resources as valuable sources of information, references, and exercise materials. Try something different and present information from another point of view (e.g., customer, competitor, user, and engineer). Finally, anticipate and prepare for participants' questions. Distilling important information for participants is also useful, so construct job aids that distill relevant information.

Conduct Demonstrations

When conducting demonstrations, experiment with using case studies related to real-life situations. Ask participants to explore controversial issues. Finally, request that participants share their own experiences related to the content.

Showing photographs or video presentations of salient portions of your demonstrations can help focus participants' attention. You can also use the drawing and text tools for highlighting and labeling. Screen sharing is a powerful method to demonstrate computer applications. Be sure to use the drawing tools to label and highlight sections of the screen. Finally, select examples and activities that mirror the setting where participants will apply their new skills.

Facilitate Practice

Incorporating practice is a powerful method for maintaining participation and interest. Assign participants to groups and ask them to collaborate on specific assignments. The group size should be no more than four participants. Assign and rotate roles within each group to ensure sharing and cooperation. If applicable, synthesize activities completed outside of the meeting. Encourage lively presentations of no longer than five minutes in length. Encourage participants to use the whiteboard. To increase the relevance of your practice, use case studies, roleplays, and simulations that mimic real-life activities.

If participants cannot interact with the real systems, provide links to train-

ing databases or test sites. If you would like participants to demonstrate their usage of applications or share information as part of interactive demonstrations or exercises, simply use your virtual meeting application to display their screen to the rest of the group.

Instigate and Manage Discussions

Managing discussions requires being both bold and careful. Open discussions with a provoking comment. Plant ideas by asking a leading question on the whiteboard or in a chat window. Discussion can quickly get out of control, so include a proposed outline of the discussion. Also keep the discussion on course by clarifying the theme of the discussion and the topics that you expect to cover. Closely manage discussions. This instruction cannot be stressed too strongly. You have some powerful tools at your disposal, so do not be afraid to use them. Use the microphone, whiteboard, chat window, or email as media in the discussion. Give learners "interesting" roles during discussions. Finally, always end discussions by restating the goals of the discussion, summarizing the results, and pointing out how the results relate to the next topic.

Assess Participant Engagement

Polling questions are a powerful vehicle for verifying understanding, waking-up participants, determining their level of engagement, or identifying where participants stand on particular issues. Ask questions that are clear, pertinent, brief, and challenging. Utilize the polling capability to ask true/false or multiple-choice questions and see how many participants select each choice. You may keep these results to yourself or share them. Include questions with a degree of difficulty that matches the level of the audience. You never want to come across as negative, so avoid feedback that is too brief or abrupt; participants may interpret such feedback as angry. You may wish to have groups use materials and assessment instruments located in a shared folder to complete in-basket exercises (e.g., completing customer service transactions in a variety of situations).

Develop and Conduct Exciting and Motivating Activities

Create constructive conflict or "creative abrasion" by:

- Asking leading questions
- Representing other points of view
- Exploring the content in a new context

Extract positive outcomes from difficult situations by:

- Directing the question to the group
- Asking the group for solutions or methods to find solutions
- Calling upon specific participants to help out

Sometimes presentations require taking some risks, so build suspense into your presentations by creating activities (e.g., discussions, games) where the results are not predictable. Also feel free to change the rules while the activities are still in motion. Do so using chats, selective emails, and several shared folders to provide different groups with varying rules and instructions.

A good method for fostering collaboration is to conduct group activities. Enable groups to communicate using chat areas or emails. If you are bold, you can have groups set up their own virtual meetings in order to work together. Be sure to assign a leader for each group.

You Are on Your Way

I hope that you will find these ideas useful in creating and delivering technical presentations that engage participants. Good luck and enjoy! 

Joel Gendelman (Joel@FTtraining.com) has over 25 years of experience developing activity-rich presentations and eLearning (www.FTtraining.com). He has developed communications solutions for companies that include Lockheed Martin, Microsoft, Nissan, Lucent Technologies, Hewlett-Packard, and Genentech. Joel has published a book and over 50 articles. He is the recipient of a Brandon Hall "Excellence in eLearning" Award and is a frequent speaker at international conferences. Joel holds both a masters and doctorate in educational technology from the Catholic University of America.



Schedule At-a-Glance

3-6 May 2009

Hyatt Regency Downtown, Atlanta, GA

	Saturday 2 May	Sunday 3 May	Monday 4 May	Tuesday 5 May	Wednesday 6 May
7:00 AM		7:30-5:00 Leadership Day	7:30-8:30 First-Timers Session (repeated)	7:15-8:15 SIG Meetings	7:15-8:15 SIG Meetings
8:00 AM	8:30-4:30 Pre-conference Workshops and Certificate Sessions (optional pricing)	8:30-5:00 STC Board of Directors Meeting	8:30-4:30 Pre-conference Workshops and Certificate Sessions (optional pricing)	8:30-10:00 Education Sessions	8:30-10:00 Education Sessions
9:00 AM			9:00-10:30 KEYNOTE GENERAL SESSION	9:00-6:00 EXPO Hall Open	9:00-1:15 EXPO Hall Open
10:00 AM			10:30-6:00 EXPO Hall Open	10:30-11:30 SIG Managers Meeting	10:30-11:30 Education Sessions
11:00 AM				Noon-1:30 SIG Lunches	Noon-1:30 SIG Lunches
NOON				1:30-4:30 Education Sessions	1:30-2:30 Education Sessions
1:00 PM					
2:00 PM					
3:00 PM					
4:00 PM		4:30-5:30 Speakers Orientation	4:30-5:30 First-Timers Session		3:00-4:00 CLOSING GENERAL SESSION
5:00 PM		5:30-6:30 OPENING GENERAL SESSION			
6:00 PM		6:45-8:00 EXPO Ribbon Cutting & Welcome Reception	6:00-7:00 STC Annual Meeting		
7:00 PM			7:30-8:30 STC Forum	7:00-8:30 Community Reception	
				7:00 HONORS RECEPTION & BANQUET (optional pricing)	

2009 Preliminary Program

The 2009 Summit will offer more than 110 education sessions with subjects touching on every area of technical communication. A preliminary list of session titles, speakers, and descriptions begins below. This list will be updated as more sessions and speakers are added to the conference. Conference education sessions are included with your registration. The conference will again this year offer advanced sessions, or institutes. Currently the following institutes are planned.

eLearning
 Professional Development
 Usability
 Collaborative Technologies and Techniques
 Structured Authoring and Content Management

The event will also include preconference workshops and tutorials, as well as the certificate sessions; all require separate registration and fees. Currently scheduled are:

Pre-conference Certificate Sessions

DITA: From Legacy to the Future
 Technical Communication Manager Certificate
 Writing for the New Tech
 Content Management
 Adobe TechComm Suite
 Localization Certificate

Pre-conference Workshops & Tutorials

A Quick Look at Adobe Captivate
 An Overview of Flare
 Accessibility of Websites for Users with Disabilities
 Creating and Maintaining Blogs for Your Products
 Best Practices for Developing User Assistance
 CSS: The Basics and Beyond
 Career Makeover Workshop

Technical Communication Summit Session Descriptions

Track: Applying Research and Theory to Practice

Elizabeth Bailey, *Improving Performance*

This session is designed to provide you with an overview of Gilbert's Behavioral Engineering Model, alternatives to his model, and examples of challenges that participants have.

Karen Baranich, *Instructional Design & Learning SIG Progression*

The Instructional Design & Learning SIG brings the experiences of its members to you by providing this progression on the latest topics around creating and using innovative instructional design.

Thomas Barker, *Modeling Public Engagement in Public Health Risk Communication*

This presentation describes a qualitative study of public engagement in health communication for pandemic influenza in Edmonton, Alberta, using an engagement model and offering recommendations for health communication consultants.

Susan Becker, *Read the Research. Don't Just Make it Up!*

You don't need to be an academic to read a research article. Even if you don't read every word, you can find support—and new directions—for your thinking.

David Dayton, *STC-funded Research Results: Single Sourcing and Content Management*

Findings from a survey and interview study of STC members about their use of single sourcing and/or content management tools; opinions about business drivers and impacts on work groups are also reported.

Jose de Souza, *Are Animations Clear and Comfortable to Use?*

Twenty-four users judged nine versions of software instructions, and they considered animated demonstrations as being the clearest and most comfortable to use. The design implications of user's observations are discussed.

Megan Leney, *Cognitive Authority in the Internet Era*

These days anyone can quickly and easily publish anything on the web. What lends authority to a website? What makes a website credible in the user's eye?

Paul Linnell, *Building Brand Value Through Technical Instruction*

Few producers of consumer goods realize how consistent design can extend brand value. This report introduces and analyses documents from the history of user instructions that demonstrate consistent brand communication.

Steve Murphy, *Improving Technical Documentation Using Graphics (static and animated)*

This case study explores the impact of graphics in software installation documentation and the necessity to revisit previous concepts in order to establish a sound foundation for new documentation and innovation.

Erin Schmieder, *Putting Theory into Practice: Research in Designing Instructions*

Instructions are integral to the usability of forms. Kleimann Communication Group will discuss a multi-faceted research project

around instruction design, including practical principles applicable to any form in any field.

Track: Designing and Assessing the User Experience

Carol Barnum, *Translation, Localization, and Usability: Chinese Website Usability Study*

This session presents the results of a usability study of an international hotel's Chinese website. We show the results of heuristic evaluation and a usability test with bilingual English/Chinese speakers.

Susan Becker, *Rewriting the Voting Experience on Election Day*

Critiquing ballots, providing guidelines, developing usability tests for election officials, simplifying language, and doing funded research—STC and UPA members are improving voting. Learn more and find out how you can contribute.

David Dick, *Effective Ways of Usability Testing Documentation*

Usability and user experience experts provide practical and simple methods for enhancing usability using email analysis to improve FAQs, and usability edits to improve Help, Q-sorting, and claims analysis.

Kristen Eberlein, *A Beginner's Introduction to Prototyping Online Information*

Technical communicators might not prototype because they believe it is expensive, difficult, or time-consuming. This workshop teaches low-fidelity prototyping techniques that are cheap, easy, and relatively fast.

Caroline Jarrett, *Designing for People Who Do Not Read Easily*

How can we design for people with impairments, those reading in a second language, or those in stressful conditions? Join us in this workshop to share best practices.

Whitney Quesenbery, *Choosing the Right Usability Technique*

There are many usability techniques, each with its own advantages and requirements. Learn how to choose from the usability toolkit to get the answers you need for your projects.

Linda Roberts, *Transitioning Web-based Information to WCAG 2.0*

Learn strategies for transitioning web content from version 1 to version 2 of the W3C Web Accessibility Initiative (WAI) Web Content Accessibility Guidelines (WCAG).

Track: Designing and Developing Content

Claire Amkraut, *Better Content Improves HP.com Conversion Rates*

Content improvements on the HP.com website resulted in a 7 percent conversion rate increase. Learn about the content improvement process and quality, and conversion and customer satisfaction metrics used to measure success.

Dia Burroughs, *Information Product Evaluation Workshop*

Advance sign-up for 30-minute analysis of your information product. An expert evaluates for organization, style, layout, and use of graphics. Bring your IP and supply your own laptop (if electronic/online).

Dawnell Claessen, *Topics in Policies & Procedures*

The P&P SIG has organized a lineup of speakers who will present a variety of topics directly related to P&P careers and practice.

Elizabeth Frick, *That's a Good Question!*

A major factor in professional success is asking questions—the right questions—especially for introverted tech writers. This interactive session will enhance your questioning behaviors with SMEs and team members.

Anne Gentle, *Documentation with Wikis, Blogs, and Online Communities*

While your documentation might not directly converse with users, learn about how wikis, blogs, and other social media technologies can enhance your documentation to help customers talk to each other.

Leah Guren, *Ten Tips for Tastier Tasks*

Are your procedures really dull? Do users ignore them? Do you suspect that there is room for improvement? This session covers best practices for writing effective, intuitive procedures.

Rob Hanna, *The Information Ecosystem: Managing Dynamic Topic-Based Content*

Explore the anatomy of enterprise content with the Information Management Model and learn how it can be applied to the creation and management of structured content.

George Hayhoe, *Implementing ISO 26514 in Your Workplace*

Learn about a new standard that can increase your productivity and visibility within your company.

Michael Hughes, *Moving Documentation Upstream with Use Cases*

How to apply case methodology and structured writing to get information developers involved earlier in the design process and to produce testable information products earlier in the development cycle.

Alexia Idoura, *Importance of Sentence-level Quality to Globalization*

By focusing on sentence-level quality, we cut translation time and translation costs in half, which allowed us to reinvest that money into additional languages (and therefore additional markets).

Karen Lowe, *The Two-Click Mandate*

How can you make system information accessible so users can find relevant information within two clicks?

Ed Marshall, *APIs and SDKs: Breaking into a Specialty Market*

This talk defines APIs and SDKs, explains who uses them and when, provides examples of typical documentation for APIs and SDKs, and covers the pros/cons of this area.

Ed Marshall, *Useful Shareware for Technical Communicators*

This talk covers advanced text editors, search-and-replace tools, file/folder comparison tools, security tools, and other tools to “let the computer do the working.”

Ben Minson, *Quick Reference Guides: Short and Sweet Technical Documentation*

Quick reference guides provide a friendly way for users to learn new products without burying themselves in a manual. With one page, users can find all they need to know.

Alan Porter, *What Tech Docs Can Learn from Comics*

The recent Google Chrome comic caused a lot of buzz. But it's far from being the first “technical” comic. Find out how comics can help you produce better tech docs.

Alyson Riley, *Scenario-driven Information Architecture*

Traditionally, scenarios are used as tools to help users understand a product or task. In our approach, scenarios are internal tools to inform information architecture and are rarely customer-facing.

Jeanette Rogers, *Training Evaluation Workshop*

Evaluations provide written and verbal comments on your training materials, covering all aspects of instructional design. Identify strengths and opportunities for improvement. Participants should submit materials prior to the conference.

Valerie Rushanan, *International Document Design: Multilingual Optimization Begins Before Writing*

Learn to identify document design issues and improve the localization readiness and multilingual acceptance of content. Work in groups to evaluate designs, focusing on layout, visual elements, technical, and cultural requirements.

Lara Whitman, *Visually Displaying Information: Best Practices in Table Design*

Tables appear in most technical documents, whether paper-based or electronic. Learn the best practices, tips, and techniques for designing tables that work. Also practice applying those skills.

Track: Developing Your Skills and Promoting Your Profession

Thomas Barker, *Academic Community Progression: A Potpourri, I and II*

This progression contains vetted session topics from the Academic SIG and Environmental Health & Safety SIG.

Jackie Damrau, *Find Your Ideal Job Using STC Resources*

This session starts with a review of Klingensmith's “10 Tips to Your Ideal Dream Job,” then shows available STC website resources, and concludes with career search tips.

Jackie Damrau, *Virtual Collaboration Using IM & Other Services*

As more companies deal with outsourcing and multiple locations, learn how to effectively collaborate using IM and other services.

Marjorie Davis, *Taking Tech Comm into K–12 Schools*

Some state education departments are adding new technical communication requirements. In Georgia, grades 6–9 Language Arts requirements contain technical writing competencies. STC should engage to increase awareness of our profession.

Rob Hanna, *Seven Habits of Highly Successful Technical Communicators*

This panel of highly experienced professionals will explore the behaviors, traits, and skills needed to be successful in technical communication.

Rich Maggiani, *Social Media in Communication*

Learn about the various forms of social media, and how they are being used in technical communication.

Jean-Luc Mazet, *PHOENIX: Death and Rebirth of the Technical Writer*

This presentation demonstrates what challenges technical writers and, by extension, technical documentation teams face and how they can reinvent themselves to adapt to the market and launch their careers.

Pat Moell, *Technical Editing SIG Progression: Editing Challenges and Opportunities*

Topics include: tracking editing metrics; editing remotely; editors' roles in screencast development, building community, editing student writing; expanding the editor's role; levels of edit; sharpening editing skills; and editing for accessibility.

Jack Molisani, *Speed Dating for a Mentor*

Have you ever wanted an STC mentor but didn't know where to look? Attend this session to meet potential career mentors.

Ruth Moore, *He Said, She Said: Mergers, Acquisitions, and You*

Mergers bring such overwhelming changes that often you are left grieving. We'll provide two perspectives of the grieving process and ways to take advantages of the changes going on.

Katherine Nagel, *Inch by Inch, Row by Row*

Building a freelance business, like nurturing a garden, is hard work. Learn marketing and customer relationship strategies you can use to cultivate a flourishing client base in a troubled economy.

Jenny Redfern, *New Insights: Technical Communication in China*

In October 2008, Linda Oestreich, immediate past president of STC, led a delegation of technical communicators to China. Members of this People-to-People delegation will review their findings and experiences.

Martha Sippel, *Selling Yourself and Your Skills to Prospective Clients*

Here are 11 things that focus on solving your client's problem(s). This presentation shows how to build client relationships by demonstrating how you can identify and resolve client's issues efficiently and accurately.

Ruth Thaler-Carter, *Getting Started as a Freelance Tech Communicator*

Today's job market is scarily uncertain. Be prepared with what it takes to freelance part- or fulltime: finding work, setting rates, getting paid, overcoming isolation, promoting yourself, and more.

Amy Vogt, *Building Cardboard Castles: Communication and Teamwork Workshop*

Communication is one of the most important skills to foster in today's workplace. This workshop will explore the ways we communicate and work with each other through a fun, team exercise.

Track: Managing People, Projects, and Business

Pamela Brewer, *Global Virtual Teams*

This panel of experienced technical communicators will focus on such issues as planning, self-concept and behavior, managing team members, using face-to-face meetings, and training as factors in successful virtual teams.

Dan Charles, *Consulting & Independent Contracting SIG Progression*

This progression features topics of interest to self-employed technical communicators and those who would like to become contractors or consultants.

Ant Davey, *Change Management 101*

Highlights from a certified change management professional program and how some of the lessons learned are being applied in an SME-rich (mostly engineering) environment to enhance technical communication.

Chris Durban, *Documentation & EU Regulations: Stay (or Get) Legal*

Product documentation that fails to meet EU (and, in some cases, national) regulations creates serious liability. Ignorance is no excuse, and courts are clamping down. Includes a review and examples.

Lori Fisher, *Social Networking:*

Improving Effectiveness and Demonstrating Strategic Value

Do you twitter? Got a TWiki? Does it matter for managers? Discuss how technical communication leaders can apply social networking technologies to improve internal processes as well as formal products.

Alexia Idoura, *Managing a Thriving Distributed Team*

Distributed teams can thrive and work just as well as, if not sometimes better than, traditional co-located teams. In today's world, having the skills to manage distributed teams successfully is essential.

Megan Leney, *Using Agile Scrum to Improve Documentation Team Agility*

Agile scrum is a developer-centric methodology. This hands-on workshop uses Agile scrum techniques to improve documentation team agility and troubleshoot issues that technical communicators face in an Agile environment.

Michael Markley, *Best Practices in Management*

This is your opportunity to meet with technical communication managers and get new ideas for managing your projects and your people.

Jack Molisani, *How to Write Contracts/Letters of Agreement*

An agreement should include far more than just the scope of the project. Attend this session to see what critical information might be missing in your agreements.

Alan Porter, *How to Make Executives Love the Publications Department*

Get the respect you deserve. Five key steps to change the publications group from an ignored overhead to one of the most high profile groups in your company.

Thea Teich, *Report from the Self-Employment Trenches*

Find out about working independently from two who have navigated the self-employment trenches for 10 and 14 years, respectively, after working for many years in corporate America, government, and nonprofits.

Ruth Thaler-Carter, *Finding, Hiring, and Working with Freelance Writers/Editors*

Tips on finding freelance writers and editors, assessing their skills to see if they fit with your organization or project, structuring assignments, integrating freelancers with staffers, heading off or resolving problems, and more.

Connie Twynham, *Training Writers Building a Local Workforce*

Innovatia is partnering with local and provincial governments to create a training program for technical writers. This presentation outlines the development of that curriculum.

Track: Producing, Managing, and Delivering Content

Robert Anderson, *Moving Forward with DITA 1.2 and the DITA-OT*

DITA enters a new phase this year with version 1.2. We'll learn about the big new features, such as keyref, and see them used in the latest DITA Open Toolkit.

Bernard Aschwanden, *Moving Unstructured Content to Structured Content*

Considering structure? Consider this: failure to correctly move legacy content can doom projects. Attend this session and learn best practices related to conversion you need to know from the outset.

Rahel Anne Bailie, *The New Face of Documentation*

The new documentation spans social networking applications, user-generated content, and alternative content types. Organizations are looking at custom strategies for managing content that supports users in particular situations.

Nicky Bleiel, *Designing and Implementing Embedded, Dynamic User Assistance*

The best software user assistance is so elegant that users don't need to look for it. This session will discuss the planning, writing, and integration of an embedded, dynamic Help system.

Garth Coleman, *Creating 3D Paperless Documentation for Final Product Assembly*

Beckman Coulter needed a new way to create product assembly instructions. Learn how 3D paperless documentation halved creation time and delivered a product that was easier for workers to understand.

Scott DeLoach, *CSS Tips, Tricks, and Best Practices*

In this session, attendees will learn best practices for using CSS to format content, including lists, links, and tables. We will also discuss how to create print-specific styles.

Scott DeLoach, *Single Sourcing with Flare: Best Practices*

In this session, attendees will learn how to use MadCap Flare to develop multiple documents and/or online help systems from a single project and how to share content across multiple projects.

Lisa Dyer, *DITA + Wiki = The Open-source DITA2Wiki Project*

In this demonstration, DITA and user-generated content live side-by-side in a real-world framework as promoted by the open-source DITA2Wiki initiative.

David Farbey, *Addressing Multi-cultural Audiences: Insurmountable Challenge or Golden Opportunity?*

The need to create technical publications that meet everyone's expectations in the global village presents enormous challenges for individual writers, for corporate technical publications teams, and for organizations like STC.

Dave Gash, *Introduction to XSL Transforms*

Introduction to XSLT style-sheet language and how it interacts with processes, and displays XML documents in a browser.

Michael Harris, *The DITA Taxonomy Specialization: Implementation and Delivery*

This session provides a nuts-and-bolts example of how to implement a DITA taxonomy and deliver content in a help system capable of leveraging the semantic technologies enabled by classifying content.

Tom Johnson, *Introduction to Blogging: A New Technical Communicator Role*

Writing a product blog can help you connect and communicate with your users while simultaneously helping them move up to a more advanced level of product knowledge.

Lesley Kelly, *Easy-to-Use Flash Templates for Multimedia Content Delivery*

Templates allow content owners to create text and multimedia content of animated software product tours using XML and screen recording files without writing or compiling code of the Flash container.

Steve Manning, *Output Options: Publishing from XML*

There's plenty of information about XML, tools, and DITA. Not so much about converting XML to needed formats. This session presents issues and options for transforming XML into usable output.

Traci Nathans-Kelly, *Applied International Technical Communication: Translation, Globalization, Realization*

Participants will learn about and discuss a variety of specific issues that arise during translation, localization, and placement of content for global audiences, clients, and vendors alike.

Sarah O'Keefe, *The Impact of Web 2.0 on Technical Communication*

Wikis, RSS, search, forums ... are they a threat or an opportunity for user assistance professionals? In this session, you'll see the integration of user-generated content and professional technical communication.

Donte Ormsby, *Lights, Camera, Training!*

Create trainings that generate the same buzz as a blockbuster movie. This presentation demonstrates Hollywood practices your company can use to engage learners and keep them wanting more.

Neil Perlin, *WinHelp, WebHelp, AIR ... Help!*

Online formats can be confusing—consider “WebHelp” vs. “Web Help.” This session describes XML, XHTML, HTML Help, WebHelp, DotNet Help, AIR, and others—and how to select the appropriate one.

Roger Renteria, *The Benefits and Pitfalls of Social Networking Sites*

Learn how to use social networking sites to benefit yourself and your organization by networking online with family, friends, and other organizations while avoiding the pitfalls associated with these websites.

Terry Smith, *Authoring DITA Content in FrameMaker*

FrameMaker 8 has built-in support for DITA that lets you create, edit, and publish DITA content. This session demonstrates both the advantages and limitations of authoring DITA topics in FrameMaker.

Terry Smith, *Online Review with Adobe Acrobat*

Adobe Acrobat lets you control your content while allowing your subject matter experts access to the documents and to each other's comments. Adobe Acrobat supports several different review workflows.

Mark Wallis, *How to Run a Successful DITA Pilot Project*

How do you mitigate the risk of a major technology change such as DITA? This presentation shares lessons learned in the first DITA pilot project at IBM Internet Security Systems.

Scott Wolff, *Practical Conditional Publishing with DITA*

Conditional Publishing DITA (workshop): learn to configure and apply conditional publishing using either Arbortext Editor or XMetal. Participants will discover important principles for applying conditional publishing to avoid common pitfalls. ❶

STC's Live Learning Center

www.softconference.com/stc

The Live Learning Center contains a list of session titles, speakers, and descriptions for the 2009 Summit. This list will be updated as more sessions and speakers are added to the conference. Visit this online portal now to plan your conference experience! ❶

In Memoriam Joyce Woods, STC Fellow

BY CHRISTOPHER JUILLET, *STC Fellow*

A light that guided the way for many an STC member, and for many in the technical communication field, went out in November. Joyce Woods, a longtime STC member, active at the chapter, regional, and international levels, passed away peacefully in her home in northern Minnesota.

Joyce began her career in the ranks of clerical staff, quickly earning an opportunity to move into graphics, then into standards, where she was responsible for checking engineering drawings for accuracy and compliance to layout specifications. Soon she was working as a draftsman, this at a time when the vast majority of draftsmen were, in fact, drafts-*men*, using drafting tables and tools, pen and ink. Learning the drafting trade enabled Joyce to move into technical illustration and graphic design, and later into the wider field of technical and training publications development and management. In 1983, she co-founded Cactus Software and Communications to provide technical writing, training, and publication consulting to clients large and small.

Joyce joined the Society for Technical Communication in 1980 and served in a variety of leadership roles in both the Houston and Twin Cities Chapters, as well as on the STC Board of Directors as Region 6 Director-Sponsor and on numerous Society-level committees. Throughout the late 1980s and 1990s, she was a regular presenter at local, regional, and international STC conferences, always quick to share her experience and wisdom with fellow members and practitioners. In 1989, Joyce was instrumental in helping to found STC's fledgling Consulting and Independent Contracting Professional Interest Committee (now known as a special interest group, or SIG).

Joyce also was active in other professional organizations, among them the Minnesota Software Association, the Twin Cities Electronic Publishing Alliance, Women in Communications, Inc., and the National Association of Female Executives. In addition to her professional pursuits, she was an avid horsewoman and a member of the US Coast Guard Auxiliary, supporting their efforts by teaching boating safety courses, handling local and regional finances, and serving as Flotilla Commander.

Joyce was elected an STC Associate Fellow in 1996 and an



STC Fellow in 2002. It was shortly before the 2002 STC Technical Communication Summit that Joyce suffered from a stroke and was unable to attend the conference to receive that richly deserved recognition and honor in person. I will always remember Joyce speaking with the assembled honors banquet audience by telephone and, in particular, the outpouring of caring and heartfelt concern for her when someone held up his cell phone and we presented her Fellowship “long-distance.”

That was one of the last two times I had the privilege of speaking with Joyce. The second was during a break at the 2006 STC annual conference in Minneapolis.

Cordell, Joyce's husband, business partner, and, yes, soul mate, brought her down, and I spent a few precious hours catching up with them both. The years since her first stroke had been hard and had taken their toll on her, but I felt joyful and honored to be able to see her again.

Perhaps the most eloquent and fitting tribute to Joyce comes from Ernie Mazzatenta, an STC Fellow and a past president. In a recent message, he wrote: “During my years in various Society offices, I got to know Joyce and Cordell. What do I remember most? Her seriousness—as she went about discharging her STC responsibilities. No one I know was more intent upon doing the best job possible. Predictably, she never disappointed us. In addition to being reliable and enthusiastic regarding her assignments, she was modest—almost shy—yet very friendly to all those around her—even the disagreeable ones!”

Serious? Yes. Joyce was serious about her career, about her craft, and about STC and what it has meant and continues to mean to thousands of technical communicators across the globe. She was serious about her almost fierce loyalty to her friends and to her guiding principals. She was serious about competence and valued it above all else. But she was also kind and funny and quick of wit. She did not suffer fools kindly, but she was kind to them (even to me, on those occasions when I behaved foolishly). I will miss her more than, perhaps, I even yet know—as will we all.

Joyce Woods—Colleague, STC Fellow, valued friend—1940–2008. ❶

Hotel Reservations for the Technical Communication Summit

STC's official hotel for the 2009 Technical Communication Summit is the Hyatt Regency Atlanta. The Hyatt Regency is the location of all activities associated with the Summit and the only hotel with which STC has a block of rooms. STC's negotiated room rate is \$174.00 (plus 15 percent tax) for either a single or double accommodation. Assure you receive STC's group rate by making your reservations no later than Friday, 3 April 2009. You may make your reservations by clicking on the link on the Lodging tab on the conference website (<http://conference.stc.org/>) or by calling Hyatt National Reservations at +1(888) 233-1234.

We want you to have the best possible experience when you attend the Technical Communication Summit. Years in advance, STC works hard to negotiate the best rate available for Summit attendees. You will find that staying at the Hyatt will facilitate networking with other attendees and will be the least expensive option as well. In addition, when you stay at the Hyatt, you help STC avoid paying penalties (known as attrition). Hotels penalize organizations when they block rooms but do not use all of them. The results are higher room rates charged to the attendees. Thank you for your help in keeping the Summit affordable for everyone. ❶

US Members: Deduct Your STC Dues

If you pay taxes in the United States, keep in mind that STC dues are tax deductible. Please note, however, that dues must be deducted from the tax return filed for the year in which they were paid. In other words, dues paid in 2008 may be deducted only from 2008 tax returns. Therefore, if you

pay your 2009 dues on or before 31 December 2008, these dues can be deducted only from your 2008 return. Members who have questions should contact their local IRS office or their accountant.

You can claim dues as a deduction in one of several ways: as a charitable ex-

pense, a business expense, or a miscellaneous deduction.

Charitable Expense

All STC members who pay taxes in the United States can deduct at least a portion of their STC dues if they claim this portion as a charitable donation. IRS publications 526 (rev. 2003) and 17 define this option:

You may be able to deduct membership fees or dues you pay to a qualified organization. However, you can deduct only the amount that is more than the value of the benefits you receive.

As a 501(c)(3) organization, STC is a qualified organization. To determine the amount of charitable contribution you may claim, subtract the cost of tangible benefits you receive from STC from the amount of dues you paid in 2008. STC's tangible benefits can be estimated at \$30 per year: \$15 for the Society's quarterly journal, *Technical Communication*, and \$15 for the magazine, *Intercom*.

STC's prorated dues system, as well as the different membership categories, might affect the amount of charitable contribution you may claim. When calculating your charitable contribution, consider the following factors:

For 2009 Dues

If you pay your 2009 dues on or before 31 December 2008, you can claim them as a deduction on your 2008 return. The amount of your dues for 2009 depends on the membership category you select: classic, student, or e-membership.

You don't need
the biggest translator,
just the best for
your business.

Size doesn't translate into service. Skip the big box providers and work with a nice boutique like SH3. Our size means we're closer to our customers. Our service means clients stick with us year after year.

Proof points are everywhere. You'll find them in our client relationships, the way we manage projects, and how we operate as a company.



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(Continued from page 36)

Classic members and limited members determine their charitable contribution by subtracting the cost of tangible benefits (\$30) from the cost of dues (\$175 for classic members). Because student members and e-members do not receive printed versions of *Technical Communication* or *Intercom*, they do not receive tangible benefits, and may deduct the full amount of dues for 2008: \$165 for e-members and \$60 for student members.

Some members also receive prorated credit, based on the month they joined STC, that decreases their 2009 dues.

Business Expense

Employers and self-employed consultants may claim the full amount of dues as a business expense.

Miscellaneous Deduction

Those who do not fall into the categories defined above may claim the full amount of dues as a miscellaneous deduction. (For miscellaneous deductions to affect taxes, the total amount of miscellaneous deductions must exceed 2 percent of your adjusted gross income.)

Money, Not Time

Please be aware that, while dues, contributions, and out-of-pocket expenses may be deducted, personal services may not. ⓘ

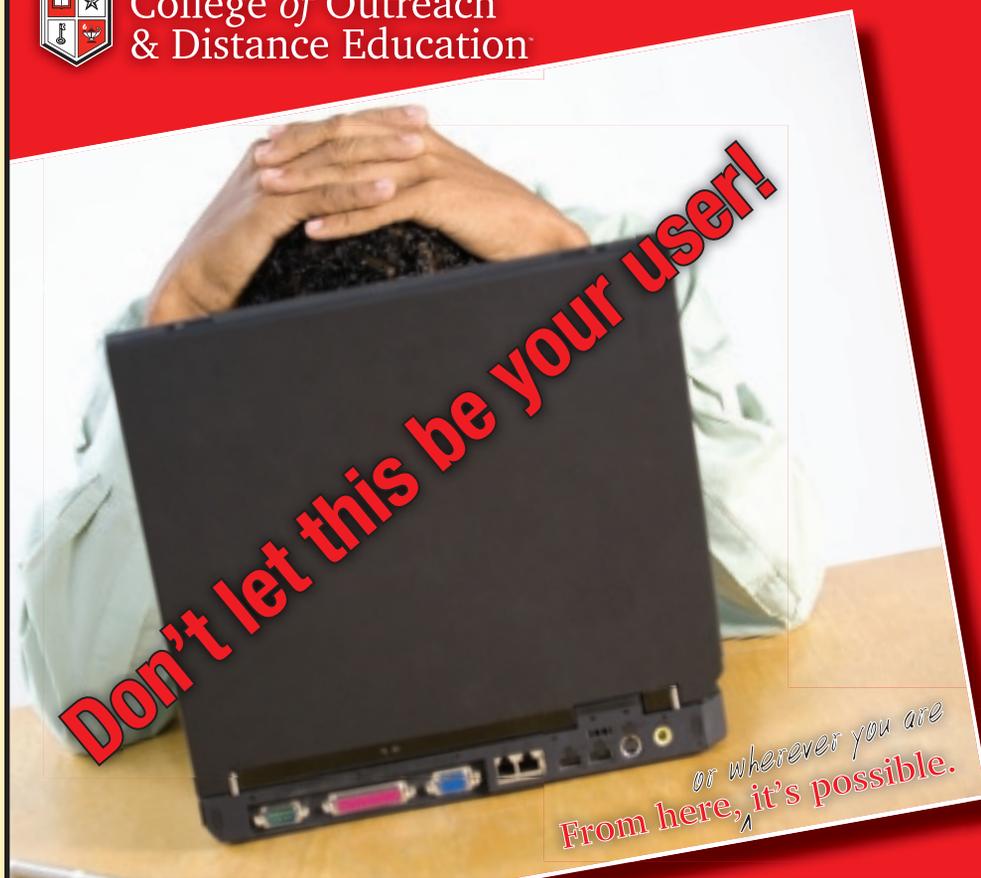
Intercom Call for Columns

Intercom features columns written by recognized experts in all fields related to technical communication. Columns provide the tech comm community and professionals a place to voice their views on the issues, challenges, and opportunities facing industry and academia in connection with the field of tech comm. Columns are intended to provide comprehensive coverage of the most important issues, concepts, definitions, trends, and techniques in the field. To this aim, *Intercom* is looking for a group of insightful and diligent volunteers to serve as regular (two to four times a year) columnists. Contact Editor Liz Pohland at liz.pohland@stc.org if you have ideas for columns or would be interested in becoming a columnist. ⓘ



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2009 Election Guide

The STC election is scheduled to begin 10 March and end at noon 9 April. In March, voting instructions and ballots will be mailed to members who selected this option on their 2009 applications and renewal forms. Other members will be emailed instructions for accessing the online ballot.

Please note that STC's bylaws no longer require the officers in STC's presidential chain of succession—our incoming president and incoming first vice president—to stand for election. Therefore, President Cindy Currie and First Vice President Mike Hughes will not appear on the ballot this year.

Candidates for 2009

The candidate information page for STC's 2009 election is now live on the STC website at www.stc.org/candidatesFAQ. From this page, you can access candidate biographies and ask questions directly of candidates.



Second Vice President

Hillary Hart

Fellow

Distinguished Senior Lecturer

University of Texas at Austin

Austin, Texas, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

I believe that effective leadership means listening to your team members and empowering people to succeed. For several years, I chaired a faculty committee on Engineering Communication and found myself doing most of the work. Last year, I took the committee to lunch, found out more about their personal lives (young children at home, etc.), and suggested specific tasks for specific individuals. Now, one committee member chairs our writing contest, another has developed a speaker series, and I can be an orchestra leader rather than a micromanager. Leadership also means connecting people who may not know they have common interests. As co-chair of the STC Body of Knowledge (BOK) Task Force, I have brought together thought leaders from the academic and the business communities to work collaboratively on some pressing issues facing the TC profession, especially the need to define a body of knowledge. The result thus far is the STC Knowledge Portal and a map of the TC-BOK domains of knowledge.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

I have chaired several university committees that have made a difference in the lives of our faculty members. To do that, I had to act very strategically and plan for appropriate resource allocation. As chair of the UT-Austin Faculty Welfare (FW) Committee, I led the effort to raise the Faculty Travel Grant awarded to faculty traveling to conferences to present papers. Working with the UT provost and various administrative committees and budget offices, I pushed through an increase in the travel grant from \$325 to \$1,200.

As FW chair, I also guided other policy recommendations through the bureaucracy and the faculty decision-making bodies at UT.

As for fiscal oversight, I have helped secure over \$3,000,000 in research funding for the School of Engineering. I have managed or co-managed the budgets for some of these projects, allocating funds for student salaries, faculty salaries, travel, administration, etc. As a member of the STC Board, I have analyzed and voted on Society budgets.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

I am so excited about the Body of Knowledge (BOK) project that STC is supporting with equal help from academic and industry members. Having organized the Academic-Industry Summit in fall 2007 and co-led the first year's work of the BOK Task Force, I am dedicated to help guide this large, multi-year project. Whatever STC eventually decides about certification, we must define the skills, concepts, and fundamentals that are necessary to be a successful technical communicator. The BOK Task Force has developed the STC Knowledge Portal to offer our members a self-assessment tool, as well as a means of evaluating TC programs. I would like to continue this effort to involve our members in defining what it means to be a global technical communicator in the 21st century.

Even more personally, I want to continue bringing the leadership skills I've developed as chair of many university and STC committees to the STC Board. It turns out I'm good at connecting people, getting the most out of them and their work, and creating a productive and cheerful work environment.



Second Vice President

W.C. Wiese

Associate Fellow

Communications Manager

Lockheed Martin Missiles and Fire Control

Orlando, Florida, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

I believe in prudent risk taking, financial responsibility, use of metrics, trust in a committed leadership team, and pursuit of best practices. I have served as president of my high school Science Club, secretary-general of the Iowa Model United Nations (which provided a firm foundation in parliamentary procedure), president of my residence house in college, and three-time president of an independent auto racing club.

My most challenging presidency involved the Orlando Chapter while our membership and spirit were declining. Previous leaders had left the chapter after an unsuccessful year. My council increased service to our members, many of whom were looking for work, and reinvigorated a partnership with the University of Central Florida. With the objectives of creating a clubhouse buzz in our meetings and celebrating the success of our members, we saw increasing response. At year-end, we had the groundwork in place that would lead to four consecutive Chapter of Distinction awards.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

As treasurer, I've participated in STC's strategic planning for four years, with additional diligence as the board of directors' principal voice regarding the financial viability of our goals.

The past two years have introduced exciting initiatives that represent STC at its best. Our work with the US Bureau of Labor Statistics, while relatively inexpensive, is opening a valuable dialogue with the principal definer of technical communication as a career. We have also begun a meaningful dialogue about the importance of the academic community within STC. Whatever strategies we pursue, they will mean little if we cannot define and teach the differentiating knowledge that sets us apart from other employees, or if we cannot attract young people into technical communication.

The next few years are key to STC's future as we assess and define the profession, reap the benefits of government dialogue, and attract the next generation of communicators.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

Most simply, the work I've helped to start is not yet finished. And I believe in where we want to go.

There is momentum to gain an accurate appraisal of what our members do by the US Bureau of Labor Statistics. There is also tremendous value in completing our work on a Body of Knowledge for technical communication. It may or may not give a compelling argument for certification, but it will enrich the profession and the way curricula are structured, and it may elevate STC's role with colleges and universities.

There is also work to be done that ensures STC's future. STC must increase its impact on and value to members, and it needs to be perceived as an essential membership for those entering technical communication. I want to get us looking outward, raising our profile to employers, engaging them in dialogue and partnerships that increase understanding of what we do, and celebrating the successes of our members. It's time to let the world know about STC!



Treasurer

Brian Lindgren

Associate Fellow

Business Development Manager

Integrated Communication Solutions, Inc.

Charleston, South Carolina, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

I try to apply the technical writing philosophy I picked up from the title of a book by Gary Provost, *Make Every Word Count*. With technical writing and organizations, less usually is more, and simpler or spartan guidelines generally improve efficiency. STC example: for the 2008–2009 International Technical Communications Competition, we sought to condense the number of categories. My co-manager and I consolidated the 15 categories down to 6, after which I took the lead and redrafted the judging forms for the new categories. This involved streamlining the existing forms (many of which were redundant within themselves) and consolidating certain criteria to apply to a broader number of categories. Work example: in documenting corporate processes, I implemented flowcharts to illustrate and simplify the process descriptions as we move toward a Capability Maturity Model Integrated (CMMI) approach to business.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

For many years, I have been involved in volunteer and trade organizations, and I have typically taken on leadership roles. At present, I am president of the Charleston, South Carolina Chapter of the Armed Forces Communication and Electronics Association (AFCEA) for 2009. Like STC, AFCEA is a nonprofit organization with an international base and regional chapters. As a leader of my chapter, I have strived to be responsive to the community through managing and planning events throughout the year, interacting with related organizations (such as the Charleston Defense Contractors Association), and making public presentations. As with STC, chapters must be in step with the overall organization's policies, and as a nonprofit we are mindful of our fiscal responsibilities and maintaining an adequate local membership to sustain corporate support. In addition, my past experience as an STC chapter president is a more direct correlation to the STC style of leadership.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

I enjoy participation in volunteer organizations that serve the needs of trade associations and/or special interest groups. In particular, I am familiar with nonprofit volunteer organizations and aware of the related fiscal responsibility. As a businessman, I understand the costs of doing business, but as a technical communicator, I understand what is truly essential to advance our profession. I

can capably synthesize these areas to be fiscally responsible to the Society. In the context of a having a different viewpoint from the rest of the board, I understand that not every situation is black-and-white and welcome the opportunity to analyze the different shades of gray, using logic and, if compromises are necessary, striving for true win-win negotiation to help navigate the group toward decisions that truly serve our constituents' best interests.



Treasurer

Aiessa Moyna
Associate Fellow
Communications Director
American Express Company
New York, New York, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

My leadership philosophy is to ensure that team members have a common understanding of vision, strategy, and goals, plus assignments playing to their skills/strengths. As a mid-level leader without direct reports, I lead cross-functional teams without direct leadership authority, driving results by sharing lessons from past projects, anticipating problems, offering alternatives, and eliminating obstacles.

Recently, I led communications for a delayed software project. To save time, the team compressed the schedule for developing and testing user communications. We thus risked releasing a product with poor documentation, making it likely that user disruption would be high, adoption of the software would be low, and the team would exceed our schedule and budget. Focusing on broad project goals, not only communications, I persuaded the team to delay until we could test the communications. Our good results then enabled us to accelerate the work, exceeding our time, cost, and adoption targets.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

As an STC member and volunteer for close to 25 years, I have amassed a wealth of experience in strategic planning and fiscal oversight for the organization at the local and regional levels.

As president of the Southern Nevada Chapter, I led the development of a new strategic plan designed to stabilize and reinvigorate the chapter following a significant drop in membership and operating funds due to job losses in the industry sector supplying the majority of our membership base. The plan focused on identifying technical communicators among and promoting STC to other industry sectors as a way of diversifying and rebuilding our membership.

As a member of the governing board for Phoenix and again as a council member for New York Metro, I have been through processes to rebalance the chapter budget by better controlling ex-

penses plus boosting existing sources and developing new sources of income.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

I want to serve STC as treasurer to help ensure the continuing success of the Society. As a student member, STC served me by offering opportunities to grow as a technical communicator through exposure to educators and professional mentors, along with the chance to assume chapter leadership roles. As a new professional, STC served me by offering employment opportunities, ongoing education, and volunteer roles in which to broaden my technical skills and gain leadership experience. As a seasoned communicator, STC continues to serve me by offering a network of other professionals with whom to share experiences and lessons, as well as volunteer roles in which to sharpen my project management and leadership skills.

Serving as treasurer would give me a chance to return the favor, helping to ensure the ongoing financial viability of the Society. In this way, I hope to help ensure that STC continues to serve other technical communication students, professionals, educators, and leaders for years to come.



Director

Joaquim Baptista
Senior Member
Director, Technical Documentation
Altitude Software
Portugal

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

I believe in developing a strong, shared vision that allows "impossible" goals to be pursued by allowing team members to systematically make the right decisions on a daily basis. I also believe that a strong team openly shares information among themselves.

I adopted agile principles to balance the dual requirements of managing and writing, trading planning for the ability to react quickly to changing conditions. Using the uScrum method, the team restructured and improved the documentation, adopted DITA, and started to develop instructional materials.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

I have led my team through yearly strategy meetings where the team assesses the company needs and identifies opportunities for adding value. These meetings resulted in a series of team challenges, including strategic objectives that took years to achieve.

I have a strong technical background and an ability to see the little problem inside the big problem. I have often solved difficult technical and organizational problems with the ingenious ap-

plication of simple solutions. I led a systematic study that made Altitude Software adopt a unique combination of wikis, web servers, and specialized systems to collect and distribute information within the company.

Having developed accounting software in the past, I am familiar with accounting principles.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

After entering the profession in 1997, attending the STC conference in 1999 was instrumental in my development as a writer and manager.

Responding to a challenge in a mailing list in 2002 led to me becoming the manager of the same list for six years. I appreciated how an enthusiastic volunteer was quickly put to work for the Management SIG.

Having suddenly been asked to consider further involvement with STC, I believe that my combination of skills can be an asset to the board. I bring an innovative nature, technical and management skills, and a desire to make a difference.

Having learned the profession by myself and then having to train people moving into the profession makes me sensitive to the needs of isolated writers and writing communities.



Director

Karen L. Baranich

Senior Member

IT Supervisor

SCANA

Columbia, South Carolina, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

I believe in the power of honest conversation to build teams and resolve issues. When I was promoted to IT supervisor, I took oversight of a team whose newest member had 15 years more seniority than I did. There was resentment but no unity. My first step was to have an honest conversation with each team member. I asked their opinion of the team and determined their passions. Then I scheduled a team planning session. As a group, we discussed the long-standing resentments and issues that had held the team captive. My assumptions were challenged, but using the information from our conversations, we began to make changes. The team name changed to reflect a new direction. We began marketing ourselves as professionals and took on new projects of our own choosing that would contribute to the company's bottom line. I continue to use weekly conversations to build collaboration and bring individual strengths to a unified team.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

I have over twenty years of experience in urban and park planning. The subject matter is different from strategic planning, but methods and thinking patterns are the same. All planning involves knowing where you are, where you want to be, and then developing methods to get from the first to the last. My active imagination helps. I love to play a mind game of "what if" and examine possible futures. I love to manipulate ideas and to look at things from multiple perspectives. I feel strongly about the value of planning and its role in managing and prioritizing the use of limited financial and physical resources. I was the first in my department to initiate strategic planning for teams. Now it is required. I facilitate departmental planning and collaborate on writing our plan. This year, I introduced a tool called the World Café. Two departments now use it in their planning. I also help local nonprofit organizations develop and implement strategic plans. Strategic planning is my passion!

What are your personal reasons for wanting to serve on the STC board or nominating committee?

I want to serve on the STC board for two reasons. First, I believe that I can contribute experience, professionalism, and creative problem skills while I serve as a voice for fellow members. The balance to my creativity is a practical bent and good sense, both of which will help in practical ways when planning the direction of the organization. My second reason is personal: Serving on the board will give me professional development experience that I would not otherwise have. These will carry over into my current job and make me a more valuable employee. While these will help me personally, I can already see, just from requesting management approval to run for office, that it gives an air of professionalism to other technical communicators who are often viewed as glorified administrators.



Director

Lori Corbett

Associate Fellow

Lead Documentation Specialist

PNC Global Investment Servicing

King of Prussia, Pennsylvania, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

My leadership style is to lead by example, working to instill enthusiasm among all participants.

Since joining STC in 1988, I have always championed roles to share my excitement and enthusiasm for the technical communication profession. One of my strengths is accentuating the positive while facing negative challenges. A recent example of this is how I led the Philadelphia Metro Chapter hospitality committee at the STC Technical Communication Summit. This was supposed to be the chapter president's responsibility, but when she was unable, I stepped in a few months prior to the conference. With previous experience at the Annual Conference in Orlando and as the immedi-

ate past president, taking on this responsibility was the best solution for the chapter. I created an organized approach with defined tasks and instilled a sense of excitement and anticipation among our members. The result was that many members attended the conference, actively participating as ambassadors for Philadelphia.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

Planning and thinking strategically about future goals and objectives, while maintaining fiscal viability have always been important to me. With a BA in economics and working in the currently volatile mutual fund industry, fiscal responsibility is simply part of my being. I am also happy to share that my family situation is very fiscally sound, a result of 28 years of careful maneuvering through the ups and downs of the economy. One of my best qualities is the ability to use good judgment when developing goals and objectives so that the fiscal viability of the organization (whether it be the Society, geographic STC community, a craft group, community association, or my family) is not in jeopardy.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

I know from first-hand experience that STC provides value to its members. Throughout my career in the technical communication profession, I have turned to STC as the best source of professional information. My membership in and work on the boards of the Consulting and Independent Contracting SIG (when I was an independent contractor), various geographic communities, and the Information Design and Architecture SIG have provided me with a comprehensive perspective toward understanding the needs of our members.

STC provides an extensive spectrum of services to its members, which in these uncertain economic times will prove even more important than they have in the past. I agree with the current five-pronged approach, identifying the strategic goals of the Society. I believe that my broad experiences will help to serve the Society as it continues its dynamic path through the coming years.



Director
Makarand Pandit
Senior Member
Managing Director and CEO
Technowrites Pvt. Ltd.
Pune, India

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

My leadership philosophy is simple! Communicate the objectives, empower the volunteers, and hold them accountable! When I became the chapter president (2005), our size had grown and we had received our first distinction award.

The expectations from us were very high. Our chapter structure

and geography is different than most others. So we took a different approach. We appointed energetic volunteers for key positions. We created positions that were required. We allowed non-STC Members to become volunteers. We emphasized reaching the entire TW community rather than only STC members. We listed the objectives and planned carefully. Each city representative was given an annual budget and some advances. This enabled them to act fast and make decisions. We started operations in two new cities. The idea worked and our membership increased. Factually speaking, all this was teamwork and it would be unfair for me to take credit.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

I have managed a company for more than 14 years. It is a multi-location company with different challenges being faced at different locations. My company gives bread and butter to more than 50 families. Financial planning, forecasting, budgeting, and auditing are essential parts of my day-to-day job. In my company, there is no marketing, financial, HR, or training process of which I am not a part. We are currently in the process of getting ISO 9000 certification.

I have served as the president of STC India Chapter in 2005, interacting closely with the chapter treasurer. I have been on the program committee of the STC India Chapter conferences five times (including serving as program manager twice). My responsibilities included coordinating with sponsors. I have served as the co-manager of the Global Membership Committee. I have strong ties with chapters in Singapore and the United States. I am aware of STC Bylaws and also the legal and taxation system in India (and the United States, to some extent).

What are your personal reasons for wanting to serve on the STC board or nominating committee?

This will be a great learning opportunity for me. I will interact with some of the best professionals the world has produced. I will have the privilege of making decisions that will affect the entire community. This will also be an opportunity to give back to the Society.



Nominating Committee
Suzanne Guess
Senior Member
President
210 Communications
Des Moines, Iowa, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

My leadership philosophy is situational and based on observation, knowing and understanding team members, determining their readiness and willingness to complete tasks, and their motivations for doing so. Flexibility is critical—one size does not fit all. An

example was a test team on one of my projects. Decisions about the test approach and plans were being made without much input from them although they were included in all meetings. Sensing something was awry, I met with the test team separately. They completely disagreed with the proposed approach and plan but had never communicated that because they were not comfortable expressing their concerns in a large team meeting. We worked together to develop an alternative which we presented to the rest of the team. Not everyone agreed with the alternative and more discussions extended our deadline, but the final version was better and all team members felt they'd been heard.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

My work and STC experiences have prepared me for strategic planning and fiscal oversight. As a consultant, I manage budgets, resources, workloads, risks, and accomplish goals and objectives with my clients' money. They keep a close eye on their money, so I have to make sure that they get maximum value for each dollar spent. As a business owner, I also keep a close eye on my company's finances and make decisions strategically and responsibly. Hard decisions are not always popular. At the STC community level, I have been VP of Membership, VP of Programs, and served a two-year term as president. During my time as president, our community rechartered, grew our membership, implemented a two-year strategic plan, revamped and improved our website, revised our bylaws, implemented a member scholarship program, and cut our budget. As a member of the LCR, I've helped other communities identify strategies and actions to help them remain strong or improve their viability.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

The main reason I want to serve on the Nominating Committee is that it's time for me to give back. During the past eight years, I've gained valuable insights and experiences in leadership, management, work/life balance, and professional development. I want to help ensure that we have a steady pool of members who've had similar learning experiences and also have the knowledge, experience, dedication, and willingness to give back to STC so we can continue to promote and achieve our goals as an organization.



Nominating Committee

Sandi Harner
Senior Member
Professor of Technical Communication
Cedarville University
Cedarville, Ohio, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

I have been in a leadership position at Cedarville University (CU) since 1985 when I developed the TPC program and have served as its director ever since. I have been responsible for adjunct professors during the hiring process, helping them acclimate to the CU culture, mentoring them, and, unfortunately, replacing them when the need arose. A good leader is one who serves those she leads.

I am successful as a leader because I care deeply about people and lead by example and encouragement. When I was asked to join the STC board as Assistant to the President (AP) for Academic and Research Programs, there was tension between the academic community and the practicing professionals. I was able to build bridges between the two communities. As AP, I worked toward a revised Research Grants Program. My committee and I proposed a research grants program in which the board would issue a Request for Proposal and a recipient(s) would be chosen to complete a \$150,000 study. As a result, a team of researchers won the grant and will be completing their important work this year.

STC's board members must think strategically about the Society's future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

Having participated in board activities for eight years, I believe I understand the need for board members to think strategically. Rather than becoming involved in the minute details of every initiative approved by the board, we need board members who can set policy and vision for the Society. A successful board member needs to be able to see the big picture and allow volunteers to carry out the plan with little control by the board.

A successful board member is also one who is savvy in matters of business and fiscal integrity. She needs to fully understand the business case for various initiatives that the board undertakes and make sure that it is a fiscally sound endeavor.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

I believe that my eight years serving on the board has given me a unique insight into the characteristics that make an effective member. Having served in this position for eight different presidents, I have seen firsthand what happens with different philosophies of leadership. I believe that my experience is exceptionally suited for the nominating committee as I can continue to make a significant contribution to the Society by giving the future leaders of the Society an opportunity to serve.



Nominating Committee

Garret H. Romaine
Associate Fellow
Technical Communications Manager
Kentrox, Inc.
Beaverton, Oregon, USA

Describe your governance or leadership philosophy, skills, and experience. Provide an example of a situation where you applied your philosophy to address a challenge, and the result.

My leadership philosophy is simple: “always be recruiting.” I constantly challenge people to think ahead, to plan their STC career thoughtfully, and to bring others along with them. I also lead by doing: I still serve in a leadership role at the local level, managing the mentoring effort. I continually meet with technical writing students at Portland State University (PSU) and offer encouragement and advice. After figuring out what motivates them, I often suggest they run for chapter office someday.

As an example of a challenging situation, I was asked by PSU to rescue the annual technical editing course, which is based on community involvement. The current instructor had been promoted to lead the entire English department and had no time to run the editing course. My job is to recruit local companies to take on a small group of technical editing interns. The first year, I barely had enough local companies signed up, but by the third year, I was turning companies away.

STC’s board members must think strategically about the Society’s future goals and objectives, while maintaining fiscal viability in a changing landscape. What experiences have prepared you for the strategic planning and fiscal oversight required of a board member?

I served at the local level as a chapter president, where I was suc-

cessful in growing the chapter and increasing cash on hand, while still delivering high-quality programs and serving the members. We worked tirelessly at strategic planning, envisioning a future where members individually thrived. Our chapter sponsored a regional conference that was successful, and we initiated several special interest groups to maintain our senior membership. These initiatives were successful and cost-effective.

I believe that in my personal life I am also fiscally conservative. I don’t have an MBA from Harvard—mine is from Portland State University. I know my way around business documents, and I am comfortable in that realm.

What are your personal reasons for wanting to serve on the STC board or nominating committee?

I have worked with many great people at STC, and I have greatly benefited from knowing them. Now it is time to give back. My goal is to keep pushing myself to lead by example, work to further our Society goals, and help this profession evolve.

I enjoy helping members reach their goals within the Society, and serving on the Nominating Committee is a big step for me to serve at a higher level. I take very seriously the challenge of continually recruiting the best and the brightest to lead us into the future. As a former hiring manager, I have experience with interviewing, checking references, and making important decisions.

Usability Certificate Available Through Texas Tech University

Texas Tech University’s Usability Research Lab, in partnership with the College of Outreach & Distance Education, is now offering user-centered design training leading to a certification as a User Experience Professional (CUEP).

The three-day program is designed for web developers, technical writers, project managers, information designers, and other design professionals who wish to better understand how to assess the usability of their products. Participants will work hands-on in the Tech Usability Research Lab to learn key skills and techniques necessary to develop, evaluate, and improve users’ experiences with a wide variety of products, from websites and software to cell phones and print documentation.

Brian Still, Ph.D., the lab’s director and one of the CUEP Workshop instructors, said that although it isn’t easy to create user-friendly products, it is a fact that usable products save money. Paying outside experts to conduct necessary usability testing often costs far more than some organizations can afford to pay; Dr. Still also said it is important to have usability skills in-house. “If you’re a webmaster, application developer, product engineer, writer, communicator, even manager responsible for designing products people use, you should know how to make those products more usable,” Dr. Still said.

Tech’s CUEP program has been specifically designed to help organizations and individuals achieve this goal. The program cost is \$1,800 for three days of training. The cost includes long-term access to an online forum and data repository available only to CUEP workshop attendees, which will provide ongoing support even after students have received certification. An all-inclusive package that includes four nights lodging, lunches, and two dinners while at Tech is available for \$2,300.

The intensive program will be offered monthly beginning in November. Each offering is limited to 10 participants to allow for individualized instruction and ample access to resources. Participants will even develop a plan and test real users in the lab.

“When they leave, not only will they be certified user experience professionals, but they’ll also be able to put into practice immediately what they learned in the workshop,” Dr. Still said.

For more information about Texas Tech’s Certified User Experience Professional (CUEP) program, visit www.uxcertification.ttu.edu. You can also register online to attend upcoming workshops scheduled monthly from January to August 2009.

For more information, contact:

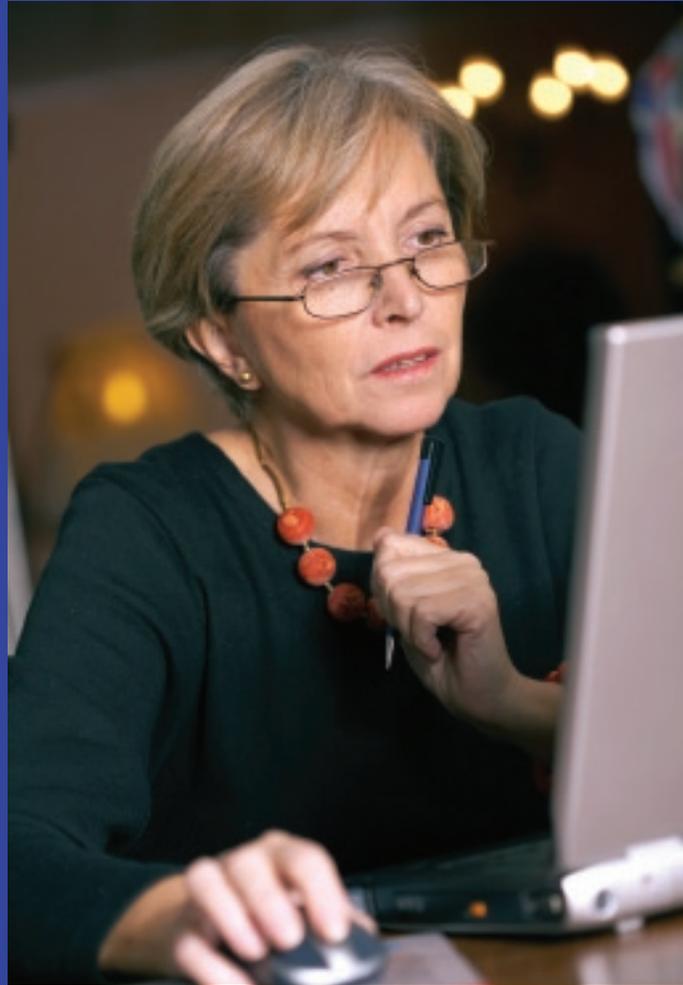
Michele Moskos, Marketing Director, College of Outreach and Distance Education, Texas Tech University

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When times are tough...

You need your
professional
society even
more



An economic downturn can have a direct impact on anyone's employment status. Make yourself a more valued asset to your company and clients by increasing your knowledge and professional skills. Take advantage of the affordable web seminars and other continuing education offered by STC, network with others to meet the added challenges, and participate with colleagues in your chapter and SIGs. And if the unforeseen happens, you will be pleased to know that STC members see the new job postings on STC's online Career Center 14 days before nonmembers. Our Salary Database can help identify where the jobs are geographically, in what industries, and where the most growth is happening.

We are your professional home.

Members can access the Career Center, the Salary Database, or register for web seminars online (login required).



Society for
Technical
Communication

Are you self-employed? Would you like to be? This column explores the joys and challenges of managing your own business in technical communication. Please share your experience and ideas. Contact Bette Frick at efrick@textdoctor.com.

Newsletters for Independents

BY ELIZABETH (BETTE) G. FRICK, *Senior Member*

T rue confessions here, again. I served as editor-in-chief of my high school newspaper and to this day have always dreamed of being a journalist (which is probably why today I'm a news junkie, listening to hours of news all day).

Of course I know that the precarious state of newspapers today parallels the sometimes precarious state of independent technical communicators. Nevertheless, I believe in newsletters as a marketing tool for independents. In this article, I will share my 13 years' experience of sending newsletters to clients and potential clients and tell you why I think newsletters might work for you.

To organize this article, I'll follow the typical "journalistic six" question structure: who, what, when, where, why, and how" (although not in that order). Did you know that these six questions were first posed by Cicero [106–43 B.C.] in his *De Inventione*? I've always thought of them as modern media tools.

Why might you write a newsletter? It's all about creating, building, and

nurturing relationships with your customers. Your newsletter should deliver lots of information and very little marketing (I aim for only about 5 percent indirect



marketing per issue) so that you don't irritate your readers. In addition to the relationship benefit of the newsletter, you'll also establish yourself as an expert in your field—a knowledgeable and

helpful resource. You'll be top of mind the next time your client or potential client realizes they need your help. After mailing each newsletter, I usually contract for about \$5,000 to \$10,000 in new business, probably because those clients may have been thinking, "Gotta contact Bette. Where is her card?"

Another reason to publish a newsletter is that once you've written great articles, you can then repurpose them and publish them in your local business journal, for example. I've done this several times to leverage my effort and exposure. You could also turn them into an e-book.

Who might be your readers? I sent printed copies of my first newsletter in 1995 to anyone who had bought ser-

vices from me or who had inquired about my services. Periodically, I've expanded the list with new prospects, sometimes after a cold-call campaign. Since we know it takes an average of between five and nine marketing contacts to establish yourself as a potential vendor for a new client (depending on which marketing guru you listen to), I consider each newsletter as one productive contact, establishing my professionalism and expertise in the field.

What will you write for them? Your newsletter content will depend on your practice specialties. I write practical articles, such as how to create better PowerPoint slides or how to deliver presentations more effectively. Someone out there is craving to read what you know! You might survey your readers to ask what they need to know or are interested in reading.

When will you publish your newsletter? You'll want to establish a regular publication schedule to enhance your professional image. I try to publish four printed newsletters and six e-newsletters a year (more about this below), but I've often published less, mostly because of my own lack of discipline. I hereby commit to establishing a definite publishing schedule and sticking to it (especially in this economy)!

Where will you publish your newsletter? Direct mail is one way to publish and deliver your marketing material. My newsletter is usually double-sided and tri-folded, sent in my branded enve-

lope with a printed label and first-class postage (so I will receive postal updates of clients leaving companies or companies that are moving). For existing clients and contacts, I usually write a comment or a note to make it more personal (one advantage of postal mail).

In 2000, I surveyed my clients and asked if they'd rather receive the newsletter as an emailed PDF or as postal mail. At that time, I received 111 responses (a 35 percent return rate); 40 percent chose regular mail, while 56 percent asked for email. Three percent said either method worked for them, and only 1 percent said not to send it anymore. So for five years, I both mailed and emailed my letter.

In 2006, my list had grown to over 400 recipients, so I chose email marketing software, Constant Contact (www.constantcontact.com), and started emailing my newsletters exclusively. My "Opt-in List" (subscribers) has grown, but I saw a decline in new and repeat business. It appears to me that the electronic version is somehow not compelling enough, so now I mail businesses I'm especially targeting (since I moved to Colorado, I'm focusing on reaching out to local and state companies here) and email all who have subscribed. I tried an experiment recently and launched an e-newsletter campaign to my former clients in Minnesota; I saw a substantial uptick in business there in the months after the campaign.

Your newsletter content will depend on your practice specialties.

How will you publish?

Old-fashioned paper publication is pretty straightforward: write, edit, publish (have the printer trifold the paper copy), print labels, buy stamps, label envelopes, stuff envelopes, stamp envelopes, mail, and update the database when undeliverable mail comes in. I use Microsoft Publisher to create my newsletter (my branding guru helped me create the template), and then I create a PDF to send to the printer (and post on my website). I hire help for the actual mailing process. I have recently started blogging (obviously, I'm not an early adopter); part of my intent in my blog

was to write material that I could repurpose into my newsletters.

The production process for the e-newsletter method is initially much more labor-intensive as you learn the software, but eventually it is far less time-consuming. It's also much less expensive and way more environmentally friendly than the paper method. On the other hand, I'm still convinced my paper version generates more business.

The only way to know if a newsletter will help your marketing process is to try it and track it. Give it an honest year with your best effort and see how it goes. Creating and sustaining a

newsletter marketing effort is not rocket science, especially for technical communicators. It just takes vision, commitment, and discipline. Remember: "I don't like to write, but I like to have written" (Michael Kanin, American playwright, 1910–1993).

To download PDFs of both my print and Constant Contact newsletters, visit this link on my website: www.textdoctor.com/resources/newsletter.html. Vendors (most offer a free trial) for e-newsletters include:

Constant Contact: <http://www.constantcontact.com/index.jsp>

ExactTarget: <http://email.exacttarget.com/>

Vertical Response: <http://www.verticalresponse.com/>
Emma: <http://www.myemma.com/> 

Elizabeth (Bette) Frick, the Text Doctor® (efrick@textdoctor.com), teaches technical and business writing in Denver companies and in companies and organizations both nationally and internationally. Her interactive classes and practical workshops help everyone improve communication skills. She holds a PhD in English from the University of Minnesota. She served as president of the Twin Cities Chapter (2003–2004) and recently served the Rocky Mountain Chapter as seminar manager.

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This column focuses on the basic principles of information design, the branch of technical communication that uses an understanding of how we humans process and understand information to develop more effective techniques to present that information. Please send your comments, questions, articles, and suggestions for future articles to the column editor, Geoffrey J. S. Hart (ghart@videotron.ca).

Typography 101C: The Role of Typeface Choice in Making Text Readable

BY GEOFFREY J. S. HART, *Fellow*

In previous articles, I discussed theoretical typographic considerations, but in practice, most of us encounter these issues at a far less abstruse level: that of typeface choice. Before proceeding, let's define our terms.

A *typeface* represents a series of guiding principles for how the shapes of individual characters arise. Although the same character in any two typefaces is more similar than different (which is what lets us recognize it in both typefaces), the typefaces themselves are as distinctive as the faces of two friends. In contrast, a *font* is the specific implementation of a given typeface. Like fraternal twins, any two Garamond fonts are recognizably the same typeface yet prove to be different upon close inspection.

Serif and Sans Serif Type

We use two major typeface classes in technical communication: *serif*, a word that refers to the small flourishes (serifs) at the ends of the

strokes that form each letter, and *sans serif*, a French phrase meaning "lacking serifs" (see Figure 1). Serifs increase the distinctions between two characters in a typeface, thereby increasing legibility; sans serif characters lack these distinctive touches, theoretically making them less legible. In practice, modern sans serif designs use tricks, such as variations in stroke width or slightly exaggerated differences in character shapes, to achieve the same result that serifs provide. A third category, *ornamental* type, serves primarily aesthetic goals, although better designs remain highly legible. A readable typeface is first and foremost legible, which is why "boring" old designs like Times remain popular: Times is space-efficient and highly legible across the



Figure 1. Serif and sans serif typefaces.

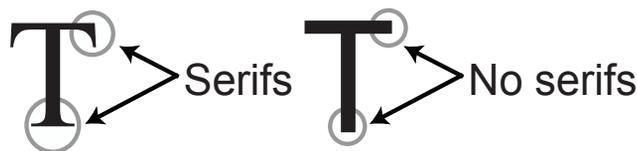


Figure 2. Typefaces can appear obviously different at the same point size. Note that at the same point size, Garamond appears shorter and Arial appears taller than Times.

Garamond Times Arial

range of sizes for which it was designed.

Prevailing wisdom (a phrase that always suggests the need for caution) states that serif fonts are best for body text because they're easier to read. Although this may be true under laboratory conditions, the increased legibility has little practical significance compared with a sans serif font designed for legibility. Many European and Nordic audiences are so familiar with sans serif type that they can read it as fast as North Americans read serif type. Well-designed studies have unequivocally demonstrated *statistically significant* differences in legibility between typefaces, but I'm aware of none that demonstrate *functionally significant* differences without an obvious difference in inherent legibility. This is because many typographic studies are flawed:

- Studies compare typefaces that differ obviously in legibility, thus predetermining the results. For example, some compare an optimally legible, skillfully typeset serif typeface with a suboptimal sans serif typeface (e.g., one designed for headings, not body text).
- Researchers control test

conditions so tightly (in order to exclude extraneous factors) that the findings apply only to the specific test conditions.

- Conversely, they fail to control factors such as line spacing and perceived type size, meaning that these *factors* are being compared, not the two typefaces. For example, many studies compare two typefaces at the same *numerical* size even though the typefaces differ greatly in perceived size (see Figure 2).

Given access to a large type library, it's easy to choose legible and illegible examples of both serif and sans serif typefaces. It's equally easy to set type so badly that even the most legible typeface becomes unreadable. The presence or absence of serifs alone does not determine legibility. Many other typographic factors are involved, including those discussed in previous articles. In most cases, familiarity with and practice reading a typeface prove more important than theoretical considerations, and it's more important to choose a typeface to support a specific goal and to typeset it properly (see Audience and Usage Considerations on the next page).

Differences Between Media

Sans serif type is widely believed to be more readable than serif type

for online text. This was unquestionably true in the early days of computing, when the display resolution was too low to clearly display the fine details of serif typefaces. *Slab serif* typefaces (http://en.wikipedia.org/wiki/Slab_serif) were a common solution because their thick serifs, which are often oriented vertically or horizontally, were more likely to be as wide as the pixels used to display them, and more likely to align with the horizontal and vertical lines of pixels on the screen. Thus, they were more likely to remain legible at low resolution.

With modern displays, resolution is high enough to legibly display type with finely detailed serifs and varying stroke widths. (This is less true for smaller electronic devices with lower-resolution screens, such as cell phones and car navigational displays. For these displays, we must carefully test typefaces to ensure they remain legible.) Modern operating systems also offer font-smoothing technologies, such as “antialiasing,” that improve the legibility of all type (for example, ClearType for Windows and Quartz for Macintosh). Interestingly, although many love these technologies, others (including me) disable them as fast as possible.

This is an important reminder that whatever the theoretical advantages of a particular typeface, personal preferences can be far more important. For example, I’ve been editing onscreen using some variant of Times for so long that working with sans serif fonts dramati-

cally reduces my productivity. Although it’s tempting to prescribe typefaces based on rules of thumb (e.g., use sans serif online) or our own prejudices (more rarely, based on usability testing), it’s wiser to let readers choose the typeface and size they are most comfortable with. Cascading style sheets (CSS) technology allows us to tightly control web typography, while still letting readers modify how their browsers interpret our definitions. For example, most web browsers let us increase or decrease type size until it is large enough for comfortable reading, and they let us choose the default fonts and type sizes the browser will use to display text when the website doesn’t specify these characteristics. Some (e.g., Apple’s Safari browser) even let us replace a poorly designed style sheet with our own style sheet.

Audience and Usage Considerations

The audience’s nature must also influence our choices, since different contexts require different solutions. For example, advertising copy or material intended for young, trendy audiences requires self-consciously “cool” typography, whereas the need to pack maximum information into minimum space without sacrificing legibility explains the tiny, dense text in phone books. Novel designers emphasize readability so readers can zip through stories at maximum speed, whereas wedding invitations are short enough that speed is irrelevant and visual elegance is crucial. Older readers tend to prefer

larger type than younger readers will accept, although it’s important to remember that visual acuity, not age, is the important factor in this preference.

Several studies have demonstrated convincingly that, at least under laboratory conditions, readers attribute certain characteristics (e.g., formal vs. casual) or even personalities (e.g., “fun”) to typefaces, and it’s tempting to make design choices based on these studies. Unfortunately, even though these studies offer intriguing insights into how people interact with type, perceptions of type remain intensely personal and subjective, and it’s dangerous to over-generalize study results. I’ve watched with amusement the recurring flame wars that spring up in online discussions between those who consider Times an elegant typeface and those who abhor it, as if typeface choice somehow had a single right answer.

Those of us who love typography sometimes forget that most readers never notice our typeface choice until it interferes with their ability to read. I’ve seen designers make foolish type choices purely to appear edgy or cool; for example, I abandoned *Wired* magazine (and didn’t return for many years) after grappling with their occasionally bizarre design choices. Several years ago, the editor of one of Montreal’s “edgy” weekly tabloids commented that during their latest redesign, they’d spent months picking fonts and fiddling with the typography—and nobody noticed. Or possibly nobody complained; I gave

up reading their paper when the type dwindled into illegibility.

Typeface Choice Is a Balancing Act

By now it should be clear that choosing a typeface isn’t something we can do by following a single set of rigid proscriptions, such as avoiding sans serif body text in print. For many purposes, default choices, such as the typefaces that come pre-installed on all modern computers (e.g., Times New Roman and Verdana), are “good enough.” Paying attention to the typographic details I’ve discussed in previous columns is more important than focusing on single aspects such as the presence or absence of serifs. Moreover, how well a text satisfies the audience’s needs depends far less on typography than it does on our writing skill, the complexity of the subject, and the quality of the display medium.

Nonetheless, well-designed typefaces and an understanding of how audiences read and the limitations of the display medium remain important. If we pay attention to these factors, “good enough” usually is good enough. The best information designs are invisible to readers, and as soon as the design attracts attention away from what we’re trying to say, we risk failing to communicate. Probably the best way to confirm that our typographic choices were effective is to ask our audience to use what we’ve designed: if nobody complains about the typography, our design probably succeeded. **1**

where

F.Y.I. lists information about nonprofit ventures only. Please send information to intercom@stc.org. For STC's complete calendar of events, visit www.stc.org/edu/relatedEvents01.asp.

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9. Baltimore, MD

10. Washington, DC

11. Portland, OR

12. Honolulu, HI

13. Dallas, TX

14. San Antonio, TX

15. Dallas, TX

16. New York, NY

12–16 February 2009

1.

The 2009 **American Association for the Advancement of Science (AAAS)** annual meeting brings science and technology professionals from across disciplines and around the world to gather and discuss new research, emerging trends, and exciting new possibilities. The annual meeting will be held in Chicago, IL. For more information, contact:
AAAS
+1 (202) 326–6450

meetings@aaas.org
www.aaas.org/meetings/

22–26 March 2009

2.

The **American Chemical Society (ACS)** will hold its 237th ACS National Meeting & Exposition in Salt Lake City, UT. For more information, contact:
ACS
+1 (202) 872–4600
help@acs.org
<http://portal.acs.org/portal/acs/corg/content>

6–7 April 2009

3.

The **STC Rochester Chapter** will host *spectrum* 2009, the longest-running STC chapter conference, at the Hyatt Regency in Rochester, NY. This year's theme is "A Golden Opportunity: Celebrating Fifty Fabulous Years," commemorating *spectrum's* 50th year. For more information, contact:
Anne McNelis and Jennifer Ferris
STC Rochester
spectrumconference@gmail.com.
www.stc-rochester.org/

17–22 April 2009

4.

The **International Society for Performance Improvement (ISPI)** will hold its annual conference in Orlando, FL, at the Walt Disney World Dolphin Hotel. For more information, contact:
ISPI
+1 301(587)–8570
conference@ispi.org
www.ispi.org/AC2009/

23–25 April 2009

5.

The **American Society for Indexing (ASI)** will be holding its annual conference, "Scaling the Heights," in Portland, OR, at the Doubletree-Lloyd Center Hotel. For more information, contact:
ASI
kmertes@hotmail.com
www.asindexing.org/site/conferences/conf2009/index.shtml

1–5 May 2009

6.

The **Council of Science Editors (CSE)** will hold its annual meeting, "Show me the Data—The Science of Editing and Publishing," in Pittsburgh, PA, at the Hilton Hotel and Towers. For more information, contact:
CSE
+1 (703) 437–4377
CSE@CouncilScienceEditors.org
www.councilscienceeditors.org/events/annualmeeting09/index.cfm

3–6 May 2009

7.

The Technical Communication Summit, the annual conference of the **Society for Technical Communication (STC)**, will be held at the Hyatt Regency in Atlanta, GA. For more information, please contact:

Lloyd Tucker
+1 (571) 366-1904
lloyd@stc.org
<http://conference.stc.org/>

18–20 May 2009

8.

The 2009 IEEE International Symposium on Technology and Society presented by the **Institute of Electrical and Electronic Engineers (IEEE)** will be held in Tempe, AZ. For more information, contact:

ISTAS
www.ieeessit.org

27–29 May 2009

9.

The **Society for Scholarly Publishing (SSP)** will hold its annual meeting in Baltimore, MD, at the Marriott Baltimore Waterfront. For more information, contact:

SSP
+1 (303) 422-3914
info@sspmet.org
www.sspnet.org/Events/spage.aspx

31 May–3 June 2009

10.

The **American Society for Training and Development (ASTD)** will hold the ASTD 2009 International Conference & Exposition in Washington, DC. For more information, contact:

ASTD
+1 (703) 683-8100
www.astd2009.org/index.html

8–12 June 2009

11.

The **Usability Professionals Association (UPA)** will hold its 2009 international conference, "Bringing Usability to Life," in Portland, OR, at the Hilton & Executive Tower. For more information, contact:

Kate Caldwell
+1 (630) 551-8490
Chair2009@usabilityprofessionals.org
www.usabilityprofessionals.org/conference/2009

19–22 July 2009

12.

The **Professional Communication Society (PCS)** of the **Institute of Electrical and Electronic Engineers (IEEE)** will hold its 2009 Professional Communication Conference in Honolulu, HI, at the Hilton Hawaii Village. For more information, contact:

PCS
<http://ewh.ieee.org/soc/pcs/index.php?q=node/231>

16–20 August 2009

13.

The **International Society of Logistics (SOLE)** presents its 44th Annual International Logistics Conference and Exhibition, themed "The Logistics of Global Security," to be held at the Omni Mandalay Hotel at Las Colinas in Dallas, TX. For more information, contact:

SOLE
+1 (301) 459-8446
solehq@erols.com
www.sole.org

19–23 October 2009

14.

The **Human Factors and Ergonomics Society (HFES)** will hold its 53rd annual meeting at the Grand Hyatt San Antonio in San Antonio, TX. For more information, contact:

HFES
+1 (310) 394-1811
info@hfes.org
www.hfes.org/web/HFESMeetings/09annualmeeting.html

22–24 October 2009

15.

The **American Medical Writers Association (AMWA)** will hold its annual conference, "Blazing the Trail," in Dallas, TX. For more information, contact:

Dane Russo
+1 (301) 294-5303
amwa@amwa.org
www.amwa.org/default.asp?id=433

28–31 October 2009

16.

The **American Translators Association (ATA)** will hold its 50th annual conference at the Marriott Marquis Hotel in New York, NY. For more information, contact:

ATA
+1 (703) 683-6100
ata@atanet.org
http://atanet.org/conferencesandseminars/annual_conference.php

& when

A Career of Transition: From Government to Industry to APL

BY WALTER RICE, *Member*

Following a 25-year career in the Federal Government and a brief stint with Titan Corporation, a defense contractor, I joined the senior staff of the Johns Hopkins University Applied Physics Laboratory (APL) in November 2000 as a technical writer/editor. APL, located in Laurel, Maryland, is a not-for-profit University-Affiliated Research Center or UARC and performs contractual work for the Federal Government, primarily the Department of Defense (DoD). APL (www.jhuapl.edu) is frequently described as a “trusted agent” of DoD, often responsible for providing an impartial, independent evaluation of work of interest to DoD. It employs about 4,300 people, mostly scientists and engineers.

While employed by the Federal Government, I worked in various capacities in the field of technical communication—from a legal publications specialist to a construction specification writer to a technical editor specializing in research, development, test, and evaluation (RDT&E) documentation. I worked for the Department of the Navy (DoN) for most of my career in the Federal Government, and I maintained a working relationship with DoN while employed by Titan Corporation. My work at APL is, in many ways, a continuation of the latter part of my career

with the Federal Government, specifically my work with DoN.

I work in the Air and Missile Defense Department (AMDD), and, as the name implies, most of my assignments relate to missile defense technology, some of which are classified. AMDD tests and evaluates operational capabilities of DoD systems engaged in ship self-defense, ballistic missile defense, and cruise missile defense in over-sea and over-land environments. Its primary sponsors are DoN and the Missile Defense Agency.

I also assist scientists and engineers in other departments at APL, including the Applied Information Sciences Department, the Global Engagement Department, and the National Security Analysis Department.

Because APL is a research facility, I am usually required to edit scientific and technical reports—the principal means of documenting organizational research—as part of my normal work routine. However, journal articles, white papers, proposals, engineering specifications, book chapters, presentations, and memorandums also comprise a portion of my workload.

Being part of the overall Johns Hopkins University, APL encourages its employees to continue with their education and to remain active in their profession.



Walter Rice, holding his book, outside of the Johns Hopkins University Applied Physics Laboratory.

As such, APL supports my membership in organizations such as Toastmasters International and the Society for Technical Communication (STC) and allows me to regularly attend the annual conference of the Defense Technical Information Center, commonly known as DTIC, where topics pertaining to DoD RDT&E documentation are presented and discussed. APL has also afforded me the time and opportunity to do something I otherwise would probably not have been able to accomplish with another employer: writing a book.

In 2004, I decided to write a book on how to prepare scientific and technical reports in the defense community, something I had been contemplating for some time because of the lack of suitable guidance in this area. I contacted a number of publishing firms; John Wiley & Sons, Inc., liked my proposal, and we reached an agreement. I completed my manuscript in two years, producing camera-ready copy, and in 2007, *How To Prepare Defense-Related Scientific and Technical Reports: Guidance for Government, Academia, and Industry* was published. In the interim, APL recognized my endeavor and appointed

me a Stuart S. Janney Fellow, which provided funding to work on my book.

How To Prepare Defense-Related Scientific and Technical Reports: Guidance for Government, Academia, and Industry has received favorable reviews and has been purchased by nearly 100 university and organization libraries, including the Gibson Library at APL. It has also won several awards, most notably STC's Award of Excellence for Technical Publications in 2007–2008 Online Communication, Technical Art, and Technical Publications Competitions and APL's Publication Award for Outstanding Professional Book in 2007.

I have enjoyed my career as a technical communicator, and I have continued to expand my interests and pursue new goals. I have mentored graduate students and co-workers at APL and now teach technical writing at a collegiate level, something I plan to continue after I retire from APL. **i**

Walter Rice is a member of the Metro Baltimore Chapter. He also belongs to the Scientific Communication and Technical Editing SIGs. He may be contacted by email at walter.rice@jhuapl.edu.

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