

Lines & Letters

Northeast Ohio STC Newsletter



December 2014

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President's Corner

Snowflakes are one of nature's most fragile things, but just look what they can do when they stick together. ~ Vista M. Kelly

A quick update on this month's NEO STC news:

- ◆ The board submitted our 2015 budget to STC International and we are awaiting approval
- ◆ Our holiday party is coming up on December 11 at the Bier Markt in Cleveland. I hope to see you there!
- ◆ Early bird registration should be opening soon for the 2015 STC Summit. We've been spreading the word that next year's Summit will be in Columbus, Ohio, from June 21-24. Watch <http://summit.stc.org/> for the early bird signup period so you can get the best deal!
- ◆ You must renew your STC membership by December 31 to retain your membership status in 2015. See the STC Membership page for details. Remember to add the NEO STC chapter to your membership package – we all benefit when you join our chapter!
- ◆ Kim Lindsey will present "Using Scenarios to Help People Learn" at our January 8 meeting. Registration details will be posted soon on the website.

Here's a suggestion for a New Year's resolution: Volunteer with NEO STC! If you would like to add "professional development" to your 2015 goals and join an NEO STC committee, please send me an e-mail. We are looking to fill the open Workshops and Competitions chair positions, but all of our committees welcome new volunteers.

I wish you and your families all the best this holiday season!

Kind regards,

Lisa Mileusnich, NEO STC Chapter President

Attend the Summit in Columbus

By Tricia Spayer

Friends: the largest gathering of technical communicators is happening next June (21-24) 2015 in Columbus, Ohio. Plan now to attend and represent Ohio!

On or around December 1, 2014, you can begin registering at the lowest price. Be sure to add the low-

cost \$10 ticket for a fun Columbus Clippers game for Monday night June 22. The NEO STC Summit 2015 Host Committee is planning the host table and fun events, including the Clippers game.

There are PLENTY of things to do within walking distance and easy bus rides from the convention center. The Summit 2015 Host Committee will be releasing several articles about things to do outside of the conference over the next several months. Keep your eyes open for Intercom, STC's Notebook Blog and STC Summit web site articles.

Remember, Columbus is only a 2 ¼ hour drive from the Cleveland area. Many of us are planning to drive – we can carpool! No worrying about air fares and all that fun going through airports.

You will have plenty of NEO STC friends to hang around in Columbus. Even if you're new, shy, or unsure about the conference experience, know that your NEO STC friends will be there to welcome and support you.

To learn more about Summit, visit <http://summit.stc.org/>. You can find information about convincing your boss, and what to expect at the Summit.

See you there!

NEO STC Members Attend World Usability Day

By Carrie Cianciola



NEO STC members and friends attended the World Usability Day event on November 13th at the Cleveland Museum of Art and included Carrie Cianciola, Denise Kadilak, Kim Lindsey, Kristen Jackson, and Myron

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Shawala. The event was hosted by the User Experience Professionals Association (UXPA) of Cleveland.

This year's theme for the 10th annual event was engagement. The event included a full day of informative sessions about how to engage people to use technology products and services:

- ◆ Michal Levin of Google presented "The Chameleon Way: How to Approach Multi-Device UX." She illustrated examples of good design using the three Cs: consistent, continuous, and complimentary. She underscored the importance of applying ecosystem thinking when approaching design and reminded us that some ingredients are not good on their own — all ingredients must blend well together. Most importantly, context matters most when making design decisions.
- ◆ Sarah Dutkiewicz, owner of Cleveland Tech Consulting, presented "The UX Toolbelt for Developers." In her presentation, she made a case for why developers must keep end users in mind throughout the development of a product. She emphasized that UX is not just user interface and visual design, but also terminology, taxonomy creation, content strategy, information architecture, and more.
- ◆ Jane Alexander, Chief Information Officer at the Cleveland Museum of Art, gave a brief talk about the museum's innovative Gallery One before letting attendees explore the gallery on their own. Gallery One features the largest multi-touch screen in the United States. Visitors can use the touch screen to discover artwork at the museum. She talked about the strategic vision for the gallery and how it has proven to attract visitors and transform the museum experience.
- ◆ Eric Meyer, through personal and poignant storytelling, and real-world examples, taught the audience that designing user experiences must take into account two types of users — the idealized, calm user, as well as the harried and uncertain user who is operating under a state of panic. The title of his presentation was "Designing for Crisis."
- ◆ Brian Buirge and Jason Bacher ended the day with a lively and humorous presentation with an inspirational focus about their personal life experience in founding their business, GFDA—"a company that trades in the commodity of inspiration." They left the audience with these five lines of parting advice: 1) Risk everything. Expect

nothing. Prepare for anything. 2) Ask for help. 3) Find balance. 4) You'll never have enough experience, time, or money. 5) Make use of your gifts, not just your capabilities.

Reflecting on her experience at the World Usability Day event, senior STC member Kim Lindsey, said "The event was inspiring from first to last, especially Eric Meyer's presentation, Designing for Crisis. I feel that everyone who writes or designs anything would benefit from Eric's insights on how the brain processes information differently during a crisis and how we can best help these users."

In the Spotlight: Linda DeLonais

By Lynn Nickels and Linda DeLonais

This month, meet Linda DeLonais.

Linda is a solo technical writer for Thermo Fisher Scientific in Oakwood Village (just west of Twinsburg).

Previously, Linda taught elementary music, vocal and instrumental in the Geneva school system for 10 years. "The kids and I had a grand time! I also polished my skills there as a teacher," she said.

"Amazing interlude: I had a baby, moved my family to Suffield, bought my abusive husband a one-way ticket to Florida, divorced him, went to NIT, met and married my favorite instructor there, and *POOF* became a Customer Service Representative (CSR) followed by a Technical Writer," she said.

As a CSR, she repaired Xerox copy machines for a little more than two years, and says she can't say that she loved that job – lugging a 40-lb tool case through winter sludge was not so much fun. But, she said Xerox was a very good company and she loved her fellow CSRs. She said it also gave her a chance to see what really good service documentation looked like and to develop a true appreciation for what it feels like to rely on that documentation at a customer site.

Then, when, out of the blue, a technical writer/instructor position opened up at Telxon, Linda became a tech writer/instructor. She provided all of the service documentation for Telxon for almost 15 years and absolutely loved it. "Flying by the seat of my pants all the way!" she said, and would probably still be there if Telxon had not moved to Texas.

That move gave Linda the opportunity to set up her own business as a contract technical writer out of her home. Later, when the economy plunged, things got a little

tight, so she was delighted when Angie Dianetti called about a “documentation emergency” at a company called Thermo Fisher. They wanted a tech writer for a two-week project. It has now been more than eight years, and she is still at Thermo.

Linda has been a STC member for more than 20 years, now. “I remember being on the Publicity committee, which ended up being composed of one member – me. As I recall, I picked up a box or two of materials from the outgoing chair and then went through everything as I tried to figure out what to do. I ended up putting together an Excel file to facilitate and track publicity notice distribution. One of my better ideas was to embed to email address links!” she said.

She has a bachelor’s degree in Music Education from Mount Union College (now University) and is also a graduate of the National Institute of Technology (now NEC) in Cuyahoga Falls, which is where she says she picked up a background in electronics.

Linda remains happily married to her former instructor. He adopted her daughter and they have a son who is a junior at Akron University majoring in computer engineering. “Our daughter is a domestic goddess who, with her husband, is raising my grandson (fourth grade already – how is that possible?). They live right next door, which is so convenient!”

Gardening and music remain Linda’s passions.

“I am REALLY looking forward to being able to do more than mount a holding action against the weeds – I intend to finally have the garden I have always envisioned! I have arranged a lot of music for our youth group at church and I want to package it and see if it is marketable – being able to accommodate beginning instrumentalists through accomplished high school seniors should appeal to other church music directors,” she said.

“It’s been a wild ride and I can hardly wait to see what comes next when I retire next April first! I still love teaching and plan on reactivating my Write Component business and doing some contract work. I may even try my hand at writing something non-technical – just for the fun of it!”

Starting a Peer Editing Program

By Claudia Thompson

There’s a problem...

Maybe your company went through a round of layoffs and you lost your dedicated editor. Maybe your editor spends more time writing than editing due to resource constraints. Maybe you never had a dedicated editor. Whatever the situation, your department has been criticized for the quality of its written work. Or even worse, your customers have complained.

What can you do to add quality control to your process in these times of restrained resources? My company’s solution was to establish a peer editing program where writers review the work of their peers before anyone else sees it.

Why do it?

If you want the technical writing role to remain your business and not everyone else’s, you’ll want to get a handle on the situation. Our department decided to make quality control a priority, and thus started a peer editing program. Here is what we hoped to accomplish with the peer editing program:

- ◆ Implement quality control measures for all customer documentation
- ◆ Produce documentation that is consistent across all product lines
- ◆ Continuously improve the team’s writing skills
- ◆ Make technical reviews easier for the subject-matter experts to complete

Okay, so we’ll just start reviewing each other’s work.

Not so fast! There is more to a successful peer editing program than that. Key components of a peer editing program that you must define before getting started:

- ◆ Levels of edit
- ◆ Peer editing’s place in the writing workflow
- ◆ Procedures for peer editing so that everyone is doing the same thing
- ◆ Metrics to help you estimate and plan for the editing task
- ◆ Authoritative writing resources and references that everyone will use

There are levels of editing?

In a perfect world, every bit of writing would be reviewed and polished until it was flawless. Welcome to reality – your production schedule does not allow for that!

It is important that you establish levels of edit that set the expectation that some level of quality control will happen in your process, regardless of time and resource constraints. Levels of edit are based on project priorities, deadlines, and the state of existing material. Here's an example of our levels of edit:

Level 1: Skim edit.

A skim edit is a minimal look at a document, without reading it word-for-word. This level of edit should only be used for last-minute and low-cost projects.

A skim edit includes:

- ◆ Spell and grammar check of content (using automated spell and grammar checker)
- ◆ Quick visual scan of content for layout, font, and pagination problems
- ◆ Verification of correct manual name, revision letter and date, running headers and footers

Level 2: Copy edit.

A copy edit is a medium-quality edit, and is the lowest that should be performed on revisions of existing documentation for products that are still early in their lifecycle and are actively in production. A copy edit yields a document that is grammatically sound and visually consistent.

A copy edit includes:

- ◆ A review for compliance with company terminology, style, branding, and trademark guidelines
- ◆ Identification of language that should be reworded for global readability
- ◆ A spelling and grammar review
- ◆ Identification of output, layout, and font issues

Level 3: Substantive edit.

A substantive edit is a complete edit that is performed on documentation for new products and substantially reworked products. This is the most comprehensive level of edit with the best quality result; content is optimized for best user experience.

A substantive edit includes:

- ◆ A complete reading of content for meaning, clarity, accuracy, completeness, and usefulness
- ◆ A review of content organization in the greater context of the documentation set, and within a

single documentation deliverable (information architecture)

- ◆ An analysis of content presentation (consistency, use of text vs. tables vs. images)
- ◆ A review for compliance with company terminology, style, branding, and trademark guidelines
- ◆ Identification of difficult language that should be reworded for global readability
- ◆ A spelling and grammar review
- ◆ Identification of output/layout issues

Production edit.

A production edit is performed on all documentation before it is released. It is a final book-level check of document mechanics at the very end of the project, after the final documents are clean and all the book-level items have been put in place. You look for issues with the following items when performing a production edit:

- ◆ View settings
- ◆ Bookmarks panel
- ◆ Document properties
- ◆ Covers
- ◆ Front and end matter
- ◆ Headers and footers
- ◆ Hyperlinks
- ◆ Font and symbol output
- ◆ Section, page, list, and figure numbering
- ◆ Figure and table output
- ◆ Layout and pagination

So, when should we do these peer edits?

When you do your peer editing may vary depending on the expectations of the project team, at what stage you start writing, the level of edit you are doing, and other factors. Here is how my company decided to time peer edits in our workflow:

Skim edit

- ◆ After the first draft has gone to the SME and all changes are incorporated

Copy edit and substantive edit

- ◆ After the technical writer has done any writing and cleanup of the first draft, but before the first SME review
- ◆ If time and resources allow, another review after all changes from the SME review have been incorporated, especially if SME markup is substantial (review only changed content on the second iteration)

Production edit

- ◆ At the very end of the project after all changes have been made and documentation has been approved, but before the document is released

You may find that the timing of peer edits works better at a different place in your workflow. For example, if your SMEs are able to focus on the technical content and not get distracted by formatting issues, you may want to do the peer edit after you have incorporated the SMEs first round of corrections.

But I'm not an editor...

You can learn – if you can write, you can edit. Once you have a defined set of things to look for in each level of edit, everyone on your team will know what to do and content will be reviewed systematically. The end result is a much more consistent and cohesive collection of written works. If you search the web, you can find checklists that you can tailor to your own set of circumstances. My department developed checklists for each of the levels of edit, and I have found that these checklists are also useful when reviewing my own work.

How do we plan for peer edits?

In order to plan your workload, you need to estimate the time it will take to do the peer editing. You can develop a fairly accurate estimate using industry-standard editing metrics as a base, and then adjust the metrics based on the condition of the material you are editing.

Consider the following factors when assessing the project:

- ◆ Is content new, revised, leveraged, or written by a non-native English speaker (ESL)?
- ◆ Has content been edited before, and at what level?
- ◆ How familiar is the technical writer with company style?
- ◆ How adept is the technical writer with the writing tool?

- ◆ How are the technical writer's writing skills?

For content that is being revised or leveraged for a new product, skim over the existing content and note the condition of the following items:

- ◆ Layout and formatting
- ◆ Compliance with company style
- ◆ Language structure and brevity
- ◆ Completeness and organization of content
- ◆ Quality and usefulness of images

Are there standard metrics for estimating editing tasks?

The quick answer is yes and no. If you search the web, you will find vast differences in the pages per hour metrics for editing. After scouring the web, however, we found there is some consensus among leaders in the technical communications industry. The following table contains guidelines for estimating how much time editing will take based on what we found.

Level of edit	Pages per hour (average)			
	New content, never edited	Revised content, never edited	Revised content, previously edited	Repurposed/legacy cleanup/ESL content
Substantive edit	2 to 4	2 to 4	6 to 10	1 to 2
Copy edit	8 to 10	8 to 10	15 to 20	6 to 8
Skim edit	10 to 20	10 to 15	20+	15 to 20

The final piece...

If you don't already have a company style guide that specifies the spelling, capitalization, grammar, and usage rules for your team's writing, you probably should create one. It's the one thing that will unify the writing of multiple writers and make your content sound like it was written by a single, professional writer. At the very least, identify standard industry style guides, glossaries, and dictionaries that everyone should reference.

The Influential Project Manager (Book Review)

The Influential Project Manager: Winning Over Team Members and Stakeholders. Alfonso Bucero. 2014. Boca Raton, FL: Auerbach Publications.

Reviewed by Jeanette Evans

It's so much about trust. So says Alfonso Bucero in *The Influential Project Manager: Winning Over Team Members and Stakeholders* when it comes to being an effective project manager.

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As a Project Management Professional (PMP) and Project Management Institute (PMI) Fellow, Bucero speaks from experience with a career spanning more than three decades including work at Hewlett-Packard Spain and International Institute of Learning (IIL) Spain. He graduated from PMI's Leadership Institute Master Class 2007 Atlanta and received the PMI Distinguished Contribution Award in 2010. Bucero has been a keynote speaker for several congresses worldwide and teacher at several schools.

You should ask the right questions to achieve success in project management. Will I have the right team and right budget, plus have achievable goals and a supportive boss? Do I have the right skills? With a "Yes" answer to these questions, your chance of achieving success increases.

To be a successful project manager, you must also be a person of influence. In *The Influential Project Manager*, Bucero explains how to set and meet goals and fulfill the ambitions of your team, your stakeholders, and yourself. These are key parts to success.

Active listening and building partnerships loom as key components. Each chapter includes forms and tips on topics involving how to influence others to support you and your ideas.

Getting back to the matter of trust and its importance to becoming an influential and effective project manager, a trust assessment appears in *The Influential Project Manager* to determine your level of influence. It also evaluates if others see you as trustworthy. "Without trust it becomes very hard to build alliances, commitment, and support from the firm. There is much more to being an effective influencer than trust, but lack of trust is a killer" (p. 165).

Informal alliances and integrity also appear as important components to the project manager's success.

Concerning integrity, Bucero asks a few good questions (p. 174): "How well do I treat people from whom I gain nothing? Am I transparent with others?"

Optimism appears throughout *The Influential Project Manager* and especially at the end. "Get your ego out of the way and move on. You are a leader who needs to serve your people" (p. 179). That is fitting advice, for sure.

Note to readers: A version of this book review is scheduled to appear in *Technical Communication*.

Newsletter Promotion Ends Feb. '15

Submit an article by the end of February, 2015, to be eligible for a drawing for a \$50 Amazon gift certificate. Two lucky people can win. Submit at newsletter@neostc.org.