

# Lines & Letters

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Northeast Ohio Chapter Sept/Oct 01

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Designing the  
future of  
technical  
communication

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TECHNICAL  
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## Guidance on Style Guides: Lessons Learned

By Chauncey E. Wilson, Director,  
Design and Usability Testing Center,  
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April 2001 Usability Interface.*

This article highlights some of the lessons that I've learned about the process of creating style guides and implementing processes for ensuring that a product is consistent in a number of dimensions. I discuss the purposes and benefits of a style guide, a process for creating a style guide, the many types of consistency, reasons why style guides fail, methods for ensuring consistency, and some references that discuss these issues in more detail.

### What is a Style Guide?

A user interface style guide can serve as:

- A tool for ensuring consistency across a product set
- A way to get groups to work together
- The repository for design guidelines and standards
- A training aid for new members of the product team

The creation of a style guide can serve as a focal activity for a team involving documentation, development, usability, graphic design, marketing, etc. The first step is to select stakeholders who can contribute in substantive and political ways. Several members of

the team should have some political clout or be highly respected for their technical expertise. These powerful stakeholders can serve as evangelists for the style guide and for ensuring consistency.

The second purpose is to describe the guidelines and standards for software or hardware products and the methods for ensuring consistency across products.

A style guide can be a training tool for new members of the design team. Since a style guide provides the basic templates, controls, and rules of design for a suite of products, a wise manager would require every new developer to read the entire document before touching a line of user interface code.

### Consistency is Not a Simple Concept!

The goal of all style guides is to enforce consistency across a set of products. Part of the early design of a style guide should be a discussion of consistency, which is a complex concept.

Consider the following types of consistency. Consistency:

- With user expectations
- Across applications that are related
- Across applications that are not related but come from the same company

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See *Guidance*, page 5

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## General Information

*Lines & Letters* is published bimonthly for members of the Northeast Ohio Chapter of the Society for Technical Communication.

This newsletter invites writers to submit articles for publication via e-mail.

### Deadlines

Deadlines for submissions are as follows:

Nov./Dec. submit by 11/01  
Jan./Feb. submit by 01/02

### Advertising Sizes/Rates

#### Full col. (2.25 x 10 in.)

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3 issue – \$94.50

#### Half col. (2.25 x 5 in.)

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2 issue – \$47.50  
3 issue – \$67.50

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2 issue – \$28.50  
3 issue – \$40.50

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# Chapter Calendar



### October 12: Networking Lunch

Longhorn, 17211 South Park Center, Strongsville.

### October 18: Using Macromedia Products in Technical Communication

Presented by Josh Healan. PPI Technical Communications.

### November 6: Networking Lunch

Rockne's, 9406 State Rte 14, Streetsboro.

### November 14: KSU's IAKM program

Presented by Dr. Thomas Froelich. Kent.

### December 13: Holiday Happy Hour

Location to be determined.

### January 2002: Consulting & Independent Contracting Panel Discussion

Presented by CIC SIG.

### February 2002: To Be Determined

### March 2002: Meeting of the Minds

Sponsored by Cuyahoga Community College in conjunction with NEOSTC. Featuring JoAnn Hackos, Gloria Gery, and Judy Glick-Smith.

### April 2002: YSU/NEOSTC Joint Meeting

### May 2002: Awards Banquet



### Feeling Lucky?

NEOSTC is making it easier for members to attend the 49th Annual Conference in Nashville, Tenn., on May 5-8, 2002. If you attend a networking lunch or regular meeting from September 2001 through February 2002, your name will be entered in a drawing for a free conference registration! One student member winner and three regular member winners will be drawn at the March 16 meeting. The more meetings you attend, the more chances to win!

(Note: The President, Vice President, Secretary, Treasurer, and Immediate Past President are not eligible. Approximate value: \$400 for members, \$100 for students. Travel, meal, and personal expenses are not included.)

# On the Front Lines

# President's Notes

**Post Your Resume!** 

Not getting the coverage you need for your resume? Expand your possibilities by posting it on the NEOSTC Chapter Web site!

Contact Kristen Jackson at [kristen374@yahoo.com](mailto:kristen374@yahoo.com)

**Don't Forget** 

The next issue of *Lines & Letters* will be available on the NEOSTC Web site in early December.

Look for your reminder post card in the mail and check us out at <http://www.neostc.org>.

**Guess who's coming to visit?** 

In March, Cuyahoga Community College (Tri-C) along with the NEOSTC will be welcoming JoAnn Hackos, Judy Glick-Smith, and Gloria Gery to Cleveland for the kick-off of Tri-C's technical writing program. Mark your calendar and keep your eyes peeled for more details!

**Counting our pennies...** 

The chapter budget for 2001-2002 is complete. To review the budget, contact Chapter Treasurer Dennis Verbiar at [cverbiar@centurytel.net](mailto:cverbiar@centurytel.net).

**Welcome!** 

We'd like to welcome seven new members to the Northeast Ohio Chapter, and we look forward to seeing you at our regular meetings.

**Transfer from BGSU:**

Kimberly Schultz

**New Members:**

Heather R. Ciulei, Susan A. Fabian, Lisa M. Irwin, Kim Jones, Susan L. Katrincsak, and Jayna Maxwell.

The Northeast Ohio Chapter currently has 185 members.

The Society for Technical Communication has 22,238 members worldwide.

**Congratulations!** 

The following members were announced as Northeast Ohio's newest senior members during the summer of 2001. Please join us in congratulating:

**Diane C. Indorf**

**Anthony J. Markatos**

**Myron M. Shawala**

I am honored to be serving as chapter president this year. This summer, many volunteers were busy planning for the new chapter year. Some activities, like competitions and strategic planning, are mentioned elsewhere in this issue. Other highlights:

.....

Our programs schedule is nearly set thanks to Programs Manager Cheryl Ridenbaugh and her colleagues Stephanie Webster and Linda Burke. Barbara Payne has agreed to organize our holiday happy hour, which is tentatively scheduled for Dec. 13.

Our March program will be particularly special. As you saw in the calendar on page 2, we've got quite a program planned. JoAnn Hackos, Gloria Gery, and Judy Glick-Smith will be coming to Cleveland for "A Meeting of the Minds" on March 16. Stay tuned for more details.

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One of our goals in the strategic plan is to improve member communication. To help accomplish that, the Web Site Committee, with the help of past president Bob Dianetti, is developing an online chapter discussion list. Subscription details will come soon.

If your e-mail or regular mailing address has changed recently, be sure to contact the STC headquarters so you won't miss any mailings.

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Mary Ellen Burke has agreed to develop a history of our chapter, including when we chartered, past presidents, etc. If any of you "old-timers" can help, contact Mary Ellen at [burke\\_me@hotmail.com](mailto:burke_me@hotmail.com).

It's going to be a great year! ☺

# Preparing for the Upcoming Year

By Mike Bates, Region 4 Director-Sponsor

I hope everyone has had a relaxing summer and had the opportunity to take at least one, well-deserved vacation.

This has been an interesting first half of 2001. We have seen significant downturns in the economy which have affected almost all segments of our businesses. Companies are experiencing layoffs and realignments to adjust to poor economic conditions. Many information developers I have spoken with have been looking for new positions, either at new companies or looking for new opportunities within their own organizations.

Regardless of whom I talk to, one question still arises: "With all of the layoffs and possible threats on my company and position today, how can STC help me? What should I be doing to better position myself in the organization?"

How do you measure the value of the materials you produce? Whether you are an editor responsible for reviewing manuals and help systems or an information developer who develops online help and integrated user assistance, you should know what value you are providing to the customer.

Value can be measured in many ways. For example, you should be able to pull the customer support call logs and compare the number of calls for a particular topic today to the numbers before you released new information in your help system.

For example, let's imagine that your customers have complained that "setting up a new Internet account" is next to impossible to do in your product. You go to customer support and ask Bill, the support rep., to pull the last months' support call logs pertaining to "new account set up." You learn that the support team has spent over 300 hours answering customer questions about how they can set up a new account. You can then calculate the amount of money you, the company, is spending to support this feature in your product. At a \$20.00 per hour pay rate, you are spending roughly \$6000 per month helping customers set up their new accounts.

**How do you measure the value of the materials you produce?**

Now that you understand how much money you are spending, you can work with your product team to find better ways to support this feature within the product and potentially reduce your overall support burden by \$72,000 per year. Now, you might say, how do I do that? I just write the books and compile the help?

You could simply document all of the information that your customer needs to know about account setup in the help and books. That may solve the problem. However, you can't guarantee that the customer will open the book or launch the help. Your goal should not only be to document all of the features in your product, but to also help reduce the number of times a customer has to access your help system or open a book. Many information developers today are wearing the hats of not only user assistance architects, but also user interface designers and usability architects. They are able to quickly assess the problems customers are having within their products, design

new solutions to help reduce customer failure, and then measure the value the changes have had in the new version. That new solution may take the form of an "Account Setup Wizard," user assistance integrated within the dialog, or better affordances on the screen. It's up to you. You need to determine what's best for your customers.

The majority of the information developers I know who have expanded their roles have not changed their business cards. They are still identified as information developers and user assistance architects. But, when times are tough and the company is looking for individuals who are contributing to the bottom line, they look at writers who have demonstrated a measurable value-add to the business first.

Whether through STC programs, internal training, conferences, etc., consider programs that will help you provide more value to your business. Look for information on user interface design and product usability to help you expand your skills beyond the traditional information developer. Learn more about how your organization measures their return on investment and the metrics used to demonstrate support burden reductions.

Not sure where to start? Turn to your fellow STC members. Many of them may have success stories to tell. Take a look at the incredible programs that your STC chapter has in store for you this year. If you don't see something you are interested in, call your chapter's program chair.

I look forward to visiting many of you this year and learning about the challenges you are facing. ☺

**Guidance cont.,  
from first page**

- With multiple style guides (note that there are often multiple style guides—the corporate logo/trademark style guide is a common one)
- With de facto standards (for example the use of blue links to denote unvisited links)
- Of terminology
- Of interaction (same keyboard activation methods throughout)
- Of visuals (general GUI layout)
- Between pages/dialogs/windows
- Within pages/dialogs/windows
- Of icons
- Of error messages

You can also define consistency as the number of *if-then* rules required to explain a part of a GUI or Web interface. Take the example of Microsoft® Paint. The object tool bar works pretty consistently—if you click on an item, then you can draw. The toolbar in Microsoft® Word has many more rules.

The following are some of the Word rules for interaction with the tool bar:

- If you click on a command button then you will get an immediate command.
- If you click on an icon with a visual area inside the icon then you get a menu.
- If you click and hold in the table icon then you display an expanding table object.

The object toolbar in Paint is more consistent because it requires one rule versus many rules in Word. Try this *if-then* exercise on a small part of a Web

End Users	Developers	Business Team
Reduced errors	Maintain control over look and feel	Produce usable systems that reduce support costs and increase user satisfaction
Less frustration	Minimize re-invention	Increase market awareness
Increased morale	Capitalize on learning	Increase product awareness
Improved efficiency	Enable production of reusable software	Reduce training costs
Increased confidence	Reduce development time	Improve staff retention
Reduced resistance to new technology	Reduce arbitrary design decisions	Increase user acceptance of new systems

Table 1. Style Guide Benefits

site or GUI application and you will get a sense of how consistent the product will be to the user.

**Benefits of a Style Guide**

Gale (1996) provides a list of benefits from different perspectives. This list can be useful for justifying the time and money spent on a style guide. Gale’s benefits are listed in Table 1.

**Support for a Style Guide**

The design and implementation of a user interface style guide requires bottom-up support from developers and mid-level managers who have responsibility for implementing the style recommendations. To get bottom-up support, it is important to have top-down support from senior management. A good way to ensure that you get bottom-up support is to:

- Have the senior management make the style guide a corporate (or division) priority.
- Include style guide development and consistency goals into management objectives.
- Get senior management to support the use of the corporate style guide periodically at senior management reviews.

**How to Create a Style Guide**

The basic steps for creating and

implementing a style guide are below. The keys to success are a good requirements process, a dedicated team of stakeholders, and iterative design and testing as the style guide evolves. Human Factors International publishes a good pamphlet that covers the style guide process well. You can view an online version at <http://www.humanfactors.com/downloads/guistandards.pdf>.

The following is my version of a process for creating a style guide.

1. Find someone who has developed a style guide and is aware of the pitfalls.
2. Work with a small group to define the requirements for your style guide. Do you want it online? Will it contain method standards? Will there be a way to do updates so that everyone will be notified? Does the style guide explain dealing with exceptions?
3. Put together a group of 8-12 people who will be committed to the style guide and can dedicate a major portion of their time. Make sure that a few people on the committee have the clout to make style guide adherence a corporate priority.
4. Define a structured process for the development of the style guide.

**See Guidance, page 6**

**Guidance cont., from page 5**

5. Start with high-level architectural guidelines and standards that will have the most impact (templates for Web pages or major features like search). Have small groups with the relevant expertise write draft sections and have the entire group review them and provide feedback.

6. After defining the high-level pages or screens, work on lower level issues and general issues like color, use of controls, and text guidelines. Base these more detailed issues on the high-level components so the design is internally consistent.

7. Continually review the sections with the committee and when they are ready, publish them to a larger audience for additional review and comment. Conduct some usability edits on key sections of the document to ensure that it is usable.

8. Decide what processes will be implemented to publicize, distribute, update, and enforce the guidelines and standards in the style guide.

9. Publish the style guide and make it clear who will maintain the document.

10. Conduct style guide training with managers, developers, QA testers, and other key groups.

11. Convince the product team to implement consistency inspections and make consistency part of everyone's objectives, bonuses, and job descriptions!

**Reasons Why Style Guides Fail: Tips on How to Avoid Failure**

Style guides can fail for a number of reasons. The following are some of the more common reasons for failure:

- **The style guide is too big.** It is best to focus on major areas that

are really critical like templates for common pages than to cover every single topic as Microsoft tries to do in the 624-page magnum opus *Microsoft® Windows® User Experience* (Microsoft, 1999).

- **There is no good publicity plan for introducing the style guide.** Prepare a publicity plan and make a splash. Put up posters and have a style guide party.
- **The users of the style guide have no performance objectives that will get them to use the style guide.** Get upper management to include some consistency objectives in the performance plan for developers and development managers.
- **Managers are not fully aware of the benefits of the style guide.** Make the benefits part of your publicity plan.
- **There is a perception that once a style guide is in place, no further usability or consistency work is necessary.** Point out that the style guide does not address macro interaction problems that can lead to product failure.
- **Key stakeholders and developers in general had no input to the style guide.** Make sure that your choice of stakeholders is not based on who has time. Provide forums for document review.
- **There is no good way to resolve conflicting principles.** Provide an easy way to resolve conflicts. This might be a discussion forum where issues are discussed for a week and then a decision is made by the style guide team.
- **The style guide has standards that cannot be followed because the development kit does not support that standard.** Make sure that all the standards and guidelines can actually be followed with all the development kits. Something that worked with the Windows

development kit may not work the same way with a Java kit.

- **There are no formal methods (like consistency inspections) to support the style guide.** A style guide in isolation will fail. Additional methods for assessing and reviewing products must be incorporated into the development process.
- **There is no good way to distribute updates to the style guide.** Provide a method for updating the style guide. Putting the style guide online is helpful, but you still need to alert people to changes and also not scare the development team who gets an update just before they ship. Work with management to develop reasonable rules on when enacting new standards.
- **The style guide is not consistent and gives conflicting advice** (for example, an earlier version of the Microsoft® Style guide had some dialog boxes with access characters and some without access characters). Review the style guide carefully and make sure that you follow your own guidelines and that all examples are consistent with all rules. Any inconsistency in a consistency document will reduce credibility.
- **The style guide is not usable.** Iteratively test and inspect the document. Constantine and Lockwood (1999) suggest evaluating the style guide on the following criteria: conformity of style guide rules with accepted usability and design rules, thoroughness of the document, convenience, consistency, and compliance (do products reflect the standards and guidelines?).
- **The index of the style guide is poor** (not enough index terms and poor use of cross-referencing). A common complaint about style guides is that the index is not sufficient.

Consider synonyms for objects (for example, text box, edit box, text field) and spend some time creating the index. Enlist the aid of a professional indexer.

- **The difference between mandatory standards and recommended guidelines is not made clear.** Have a clear way to indicate what MUST be followed and what SHOULD be followed.
- **There are too many words.** Don't get wordy. It is useful to explain the rationale between a rule, but don't go into too much detail.

### **How to Improve Consistency Beyond Style Guides**

As a consultant, I wrote several style guides. One of the ways to get consistency into everyone's mind is to have product teams take a short "Style Guide" consistency course with a number of short exercises on noticing and correcting inconsistencies. Even if you don't use a particular style guide, it might be worth having a lunchtime seminar where you do some "Can you find the inconsistencies?" exercises.

Group consistency inspections are a good way to reveal problems and gaps in the style guide. They are also an excellent way to stimulate cross-group consistency in areas that the style guide covers as well as areas that are not covered by the style guide. These inspections generally require a catalog of screen shots that can be marked up and if possible, a working prototype that allows a review of interaction consistency.

Error messages can create many problems from simple irritation to loss of data to support calls. If you are starting a new project, consider a general-purpose, error-handling tool. It is useful to have a general-purpose error-handling tool that lists all the messages. These messages could be

reviewed for readability, consistency, and usability and changed by someone (a writer, editor, or usability or tech support person) other than the developer. The ability to print out all error messages easily can be a real asset for usability, consistency, and accuracy reviews.

Printing out Web pages or GUI components and laying them out in a rough workflow in a public area (not where customers will see, but where internal folks would see) and asking people to write comments on the screen is effective. You can roll these items up and carry them around to meetings (I call them "GUI Rolls"). If you have a large color plotter somewhere that can do very large rolls, that is the best way. You can layout sequences of screens with Visio® for example.

You can also do a formal consistency inspection on the GUI rolls that gets into detailed interaction and flow consistency in addition to look and feel issues.

To raise awareness about style guide issues at one company, we enlarged sections of our style guide to poster size and put them up in a number of conference rooms for several months. After a few weeks, people would sometimes point to the posters when they were reviewing a specification and say—hey, this product doesn't follow that guideline on the wall.

Nielsen's edited book, *Coordinating User Interfaces for Consistency* (Nielsen, 1989), is dated but still the only general reference on the issue of consistency. There are many good ideas beyond style guides for obtaining consistency across a product set.

### **Summary**

A user interface style guide is a foundation for design but doesn't

guarantee the success of a design. A style guide is only one link in the chain of user-centered design activities that are important for product success. Requirement analysis, user profiles, task analysis, testing, and iterative design must accompany a style guide. Don't let your development team believe that all usability problems are solved once there is a style guide! ☺

### **References**

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Gale, S. "A Collaborative Approach to Developing Style Guides." *Conference Proceedings on Human Factors in Computing Systems* April 13 - 18, 1996, Vancouver Canada. ACM Press, (pp. 362-367).

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## **Writing In Ohio**

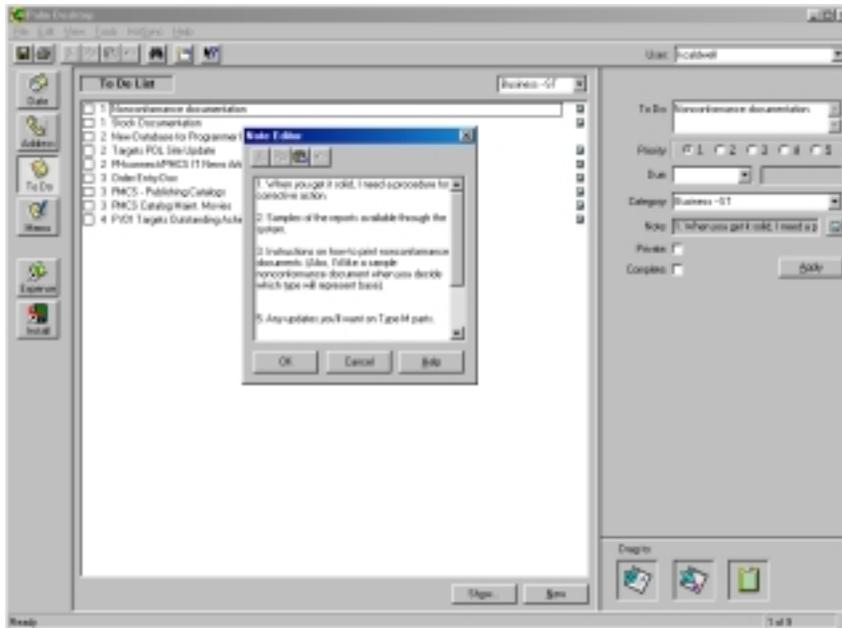
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# Technology Review

## Using my PDA as a Project Management Tool



By Karla Caldwell,  
Newsletter Co-editor

When I bought my Handspring® Visor Deluxe, my brother made fun of me. He called it my “\$250 pencil and paper,” and never missed an opportunity to mock my new tech toy. For a while, I almost believed him; had I wasted my money on my personal digital assistant (PDA)?

The answer today is a firm no. Along with the great address book and video games galore, my PDA is the most valuable project management tool I own. To explain better, let me take you back a few months...

My life was crammed with little bits of paper: Post-it® notes, pieces of envelopes—you name it. I stuffed all of this into my briefcase, my purse, and my pockets, but when the time came to produce the *one crucial piece* of information, I was at a loss.

Enter the PDA. Granted, I still have my slips of paper, but now I enter all of

the information into the PDA and simply toss the paper out. But, where the PDA came in really handy was in managing the diverse and various projects I work on during the course of the day.

The Palm operating system (Palm® OS) comes with a feature called “The Palm Desktop.” On the desktop, the user has access to a calendar, a memo pad, an address book, and a to-do list. The to-do list can be broken down by customizable item types, priority level, and project notes.

Using this customized hierarchy, I’ve created a system that allows me to manage projects all the way down to the task level. At the top of the hierarchy, I have three main item categories: Business – LT (long term), Business – ST (short term), and Business – HOLD. The long and short term categories are based on projected completion dates. The HOLD category is for projects that I’m going to have to wait indefinitely to start. (For example, the SME on maternity leave.)

My ST category contains projects I’m working on now and hope to finish within a few months. The LT category contains the projects I have waiting on deck. For example, I know that when I finish documenting a module for the resource planning system, there will be another module waiting. I won’t begin to work on that module until I’ve completed what I have now, but having that reminder on the horizon makes me mindful of information that might add to the value of the project (which I can always tuck away in my Palm® OS memo pad).

The next level is priority. Admittedly, the priority levels are arbitrary, and they can change from week to week. But, having some identification for which projects are hot and which can wait a day or two helps me to devote my time to the place where it’s most needed. The Palm® OS comes complete with five priority levels that can be assigned with the click of a button. In the view window, projects are ordered automatically by your settings.

Finally, I use the note function to indicate specific tasks for the project. For example, if my SME for project X shows up with a change to the documentation while I’m working on another project, I add the changes as a task note for that project. Later, when I come back to project X, I know what I need to do.

Having everything together on my PDA makes me much more productive, and ensures that I don’t miss a task just because it was on a piece of paper in another stack. I’ve also found that the record on my PDA to-do list allows me to give my supervisor accurate and detailed status reports for projects. Best of all, the only scraps of paper at my desk are in the recycle bin. ☺

# Calling all Communicators!!

By Lori Klepfer, Competitions Committee and STC Senior Member

Have you or your company produced technical publications or online information products that you think are worthy of awards? Would you like your work to be recognized by your peers? Enter your best work into the Northeast Ohio Society for Technical Communication Technical Publications or Online Communication competitions.

Entering the competitions not only provides an opportunity for recognition of your hard work but also provides you valuable feedback from other experienced professionals. How better can you obtain individualized,

specific feedback? In addition to helping you improve your skills, feedback from the competitions can help you market yourself.

Individuals have been known to submit judges' comments to their manager as part of their annual performance review. And we all know awards look great on your resume!

Anyone can enter their work into the competitions. You don't have to be an STC member.

Entries are critiqued by a panel of experienced professionals. Those entries earning a Distinguished Technical Communication award are automatically entered into the

International Competition where the best of the best are determined.

This year, we are exchanging our publications entries with the Mid-Tennessee chapter. They will be judging our entries while we judge theirs.

For online forms and additional information about how to enter the Technical Publications or Online Communications competitions, go to the Chapter Web site: <http://www.neostc.org>. You can also contact Cheryl Bennett or Jeannette Evans (see officer list on page 11 for e-mails.)

The deadline for submission is **October 12, 2001.** ☞

## Judging Offers Professional Growth Opportunities

By Lori Klepfer, Competitions Committee and STC Senior Member

Have you ever wanted to volunteer for STC, but didn't want to commit to the term of being an officer? Volunteer to be a judge in this year's Technical Publications and Online Communications competitions.

Whether you are an experienced judge or new to the event, we need you.

This year we have the honor of reviewing publication entries from the Mid-Tennessee chapter. Our chapter is judging our own online communication entries.

Your time commitment spans about a month. Judging assignments will be distributed on Oct. 20, at which time you will be trained on the responsibilities of being a judge. We will convene as a group on Nov. 10 to review each judge's comments and assign awards.

More experienced judges will be teamed with newer ones to build a strong, mentoring experience for all judges. This is an unbeatable opportunity to meet other professionals, gain exposure to the techniques your peers are using, and help the chapter.

Serving as a Technical Publications and Online Communications judge looks great on your resume and can help you become an international judge, which is also a very rewarding experience.

To review the criteria for being a competitions judge, go to our Web site at <http://www.neostc.org>. You will also be able to download the form you need to fill out to apply for a spot on this year's judging panel.

The Competitions Committee looks forward to working with you! ☞

## The Esoteric Editor

On behalf of the NEOSTC members, the editors of *Lines & Letters* send our sincere sympathy to members of the New York Metro Chapter, the Washington, D.C. Chapter, and all of the other chapters in Regions 1 and 2 who most closely felt the loss of September 11th's tragedy.



*Our thoughts and prayers are with you in this difficult time.*

*Sharon and I would like to encourage everyone to submit to the newsletter. So, we've created a new section for your letters and views.*

*Please send letters to the editors in care of [kcaldwell@parker.com](mailto:kcaldwell@parker.com); or, you can send them by "snail mail" to:*

*Karla Caldwell  
Parker Hannifin Corp.  
6035 Parkland Blvd.  
Cleveland, Ohio 44124*

# Chapter Strategic Plan Update

In June and July 2001, administrative board members of the Northeast Ohio Chapter STC met to develop a strategic plan for 2001-2004. This plan, which is structured like the Society's strategic plan, consists of:

1. Five high-level goals
2. Specific strategies, where appropriate, that are related to the goal
3. Activities planned to achieve the goal

4. The committees responsible for the activity
5. A target completion date, if applicable

This plan is a shared vision of where we want to go as a chapter, and will help ensure that NEOSTC members receive value for their investment.

## **SUMMARY OF GOALS:**

1. Improve communication among members

2. Improve employment resources for members
3. Increase educational opportunities for members
4. Increase visibility in the educational/academic community
5. Increase visibility among non-members

After the chapter plan was completed, the Employment Committee developed their own strategic plan. Both plans will soon be on the Chapter Web site at <http://www.neostc.org>. ☺

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## Employment Committee Strategic Plan

This plan outlines the identified tasks that will be initiated during the NEOSTC FY01-02 season.

Goal: Improve employment resources for NEOSTC members (Goal #2 from "Chapter Strategic Plan Update")

### **Strategy 1.0: Improve [www.neostc.org](http://www.neostc.org) Employment Page**

1.1 Ensure that employment notices are added to and removed from [www.neostc.org](http://www.neostc.org) as quickly as possible

- Work out a plan with Webmasters to routinely update employment notices.
- Work with employers to maintain the status of job postings with relation to if a position is filled, changed, or no longer available.

1.2 Solicit member resumes for [www.neostc.org](http://www.neostc.org)

- Conduct a survey to determine the value of this resource. Based upon responses, we will continue to maintain or will drop entirely.

1.3 Coordinate Employment Page with the rest of [www.neostc.org](http://www.neostc.org) to ensure that local openings and candidates are listed

- Work with Webmasters to push/pull content to/from both pages.

1.4 Create employment listserv (if message volume dictates)

- Conduct a survey to determine the value of this resource. Based upon responses, we will determine how to implement and maintain the listserv.
- Issues with maintenance of listserv: host server, contact administrator, rules and procedures for use demands an overseer to ensure users are not abusive of the service.

### **Strategy 2.0: Increase awareness among employers**

2.1 Develop and maintain a list of local companies that employ technical communicators either permanent staff or contractors

- Conduct a survey to identify companies using the first-hand

knowledge of our members.

- Company listing will be maintained on an annual basis.

2.2 Develop and maintain a list of local recruiters and employment agencies that serve technical communicators

- Conduct a survey to identify recruiters and employment agencies using the first-hand knowledge of our members.
- Elizabeth will compile a list of agencies.

*Note: We will include general tips and tricks information to aid job search.*

2.3 Send STC information to employers who advertise openings in local newspapers

- Along with PR, we will define a target-marketing strategy to identify selected companies to solicit.
- Along with PR, we will create a letter that describes STC, explains the value of our group,

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**See *Employment*, page 12**

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# Upcoming Conferences

**Region 4 Conference -  
Ann Arbor, Mich.**

(Hosted by the Southeastern Michigan Chapter)

There's a growing need to make software products and e-commerce Web sites more user friendly.

Explore this issue and more at the 2001 STC Region 4 Conference on November 3, 2001.

**Region 1 & 2 Conference -  
Northern N.J.**

The Region 1 & 2 Conference – Communicators in Concert; join us

January 17-19, 2002 for insights, tools, and techniques.

To learn more, visit <http://www.stcregion.org/region2/index.shtml>

**The Third Annual Best Practices Conference - Chatham, Mass.**

(Presented by Dr. JoAnn Hackos)

Join Hackos at "Building a Strategy-Focused Organization" on October 22-24, 2001.

To learn more, visit <http://www.infomanagementcenter.com>



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## September Meeting Wrap-Up: Discussions about Hot Topics in Technical Communications

By Sharon Ambro, Newsletter Co-Editor and Kim Lindsey, Secretary

NEOSTC held our first meeting of the 2001-2002 year September 20 at the Holiday Inn in Independence. The meeting consisted of several roundtable discussions with a moderator hosting each table. Topics and moderators were:

**Managing People:** Monica Lusk  
**Managing Projects:** Bob Dianetti  
**Employment:** Elizabeth Simeral and Myron Shawala  
**Tools:** Beth Williams  
**Getting to Know STC:** Kris Henige  
**Usability:** Lori Klepfer

Details of the discussions at the Tools and Managing Projects tables are below:

Topics at the Tools table ranged from Adobe® FrameMaker to duct tape.

Moderator Beth Williams led the table in a lively discussion on desktop publishing options, online help developments, and of course the merits and foibles of Microsoft® Word. Members at the table enjoyed hearing about others' experiences with early PCs and word processing programs long gone but not forgotten.

The discussion at the Managing Projects table included project management methodologies, estimating project scope, and project timelines. Moderator Bob Dianetti shared his experiences with managing projects of different lengths. Bob offered that shorter projects can be harder to manage because there is less time to adapt to changes in the project. Members at the table also talked about Microsoft® Project as a project management tool, discussing how it does not manage more than one project at a time. ☺

## Employment cont., from page 10

and details the services that we provide, emphasizing employment job postings as a free service.

2.4 Place an ad about our chapter in the Sunday classifieds

- Along with PR, we will develop an ad focused on posting jobs with STC.

2.5 Create a voice response hotline for job openings

- This old-school approach takes more time to maintain than value.
- Simplify by including message that refers job seekers to our Web site.

For more information or to join the employment committee, contact Elizabeth Simeral or Myron Shawala.

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