Boston Broadside

The Boston Chapter Newsletter November 2007

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What is Structured Authoring?

By Neil Perlin

Structured authoring has become an increasingly hot topic in recent years. In theory, it can make documents easier for users to read, easier for authors to write, and easier to single source. It isn't perfect, of course. It reduces author'' creativity. It demands more detailed planning and a higher level of technical skill and rigor than your company's culture may support. It can get political. And nothing is ever as easy as its adherents claim. But the benefits should offset the drawbacks. So, let's select an authoring tool and get going!

Just one problem … what is structured authoring?

Outside the DITA and structured Framemaker communities, there's little consensus on an answer. So how do we justify structured authoring, never mind do it? In this column, I'll suggest four different definitions. One is silly, but it's here to make a point. Then I'll explain why, in my opinion, there's no one correct definition. Instead, the appropriate definition depends on each company's intent for its material and its culture, not the technology or the tools.

Definitions of Structured Authoring

So what is structured authoring? Here are four operational, not theoretical definitions:

1.) Hand-formatted. All the material is in Normal style, with the heads and subheads hand-formatted using the formatting toolbar. This is common in documents created in Word. The material has a visual structure but no programmatic structure, so there's nothing at the code level for conversion tools to work with. (This isn't entirely true. RoboHelp has a Word import parser that tries to infer what the author was trying to do. It's surprisingly effective but doesn't solve the basic problem—authors who don't use "true" styles.)

   This is the silly definition that I mentioned earlier. If it's silly, why list it? The reason is that authors need to understand the difference between visual and programmatic structure in order to create "truly" structured documents. Many authors don't. Until they do, any structured authoring effort is likely to fail because the authors won't understand what they're doing. As far as they're concerned, it's just a change in how they work, but for no clear reason.

2.) Structured using head styles. The material now has a programmatic structure that can be used for further processing, such as telling a help authoring tool's import feature to split an incoming Word file into separate topics every time it finds text in a particular head style. This is common in documents created in Word or mainstream help authoring tools by authors who are just starting to use styles.

   This option is better than option 1, but still far from perfect because the programmatic structure—controlled by the styles—is at the author's discretion and not enforced by the software.

3.) Structured using head styles and a template. The material has a programmatic structure that supports further processing, like option 2. Option 3 is found in documents created in Word or mainstream help authoring tools by authors who are moving beyond simple styles and creating templates that incorporate styles or style sheets.

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From the Boston Chapter President

By Steve Greffenius
STC-Boston Chapter President

Any job can seem hard to undertake, even if it's fun and you have a lot of good friends behind you. The work we do for our large and durable Boston Chapter could be described that way. It can seem overwhelming and yes, even paralyzing, if you don't figure out exactly what you'd like to accomplish. You want to relate general aims to specific tasks, break things up into doable chunks, and persuade others to join you. In other words,

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write the recipe before you cook the stew.

Recipe writing wasn't actually on my mind when I wrote an e-mail message to my extended family a month ago. I just wanted to tell them about my work with STC-Boston. First, I mentioned the leadership ladder, where you start as second vice president, then move up the ladder one rung at a time, one year at a time. By the time you're the immediate past president, you've become the chapter's seasoned sage.

Then I mentioned three things to accomplish this year. What a difference just to write them down! No longer bouncing in and out of my head, they now appeared in a compact, written list:

- Improve communication and teamwork for all the chapter's various bodies.
- Put our membership numbers on an upward trend.
- Strengthen our chapter's ties with other allied organizations.

Let me expand a little on communication and teamwork. The other two items can wait for future articles.

Every leader wants to improve communication and teamwork. While they sound like boilerplate goals, our chapter has some specific needs in those areas. Here are three: communication with all our members, coordination within committees, and council bylaws as they relate to team building.

For some of our members, the administrative council can seem somewhat removed, its conduct of business somewhat opaque. To open up the council's activities, we should publish minutes for its monthly meetings. Well-prepared minutes communicate decisions, plans, and proposals. Most importantly, regular communication of the council's agenda encourages people to contribute their own time and thoughts.

Another initiative we can take to improve communication is to help volunteers collaborate more effectively. E-mail has so many advantages that it's easy to overlook a key disadvantage; you're typing at a keyboard and screen by yourself.

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This method is better than option 2 because the template supports the use of styles. The author no longer has to apply styles manually by selecting from a style sheet or pulldown. Instead, the author simply types headings, text, etc., in different parts of the template to which the template's creator has already assigned styles. The author's material gets automatically styled. What's still missing, however, is enforcement of the styles. Authors can modify the styles at their discretion and the software won't stop them, which brings up the final option.

4.) Structured by adhering to a DTD or schema, like DocBook or DITA. The material now has a programmatic structure that's defined by and enforced by the software; material must follow the structural rules dictated by the DTD or schema. GUI authoring tools that work this way "know" where the author is within the body of a document and will only let the author do things that are legal according to the DTD or schema. For example, an author could only insert a level 2 heading after a level 1. The software won't let the author insert a level 3 heading after a level 1 heading.

So option 4 is clearly the best choice, or is it? Although it is a better choice because of the support and enforcement of structure, it may not be the best one in many cases because of issues of intent and culture.

The Intent and Culture Issues

Intent and company culture may force authors away from option 4, no matter how good it seems. Consider these issues involved in adopting option 4:

- Current mainstream tools like Word and help authoring tools support styles and templates but don't support structural enforcement, so companies will have to buy new tools. With the cost of new tools comes the cost of training and lower productivity until authors learn the new tool. (Many companies skip training and tell authors to "figure it out." This is a short-term savings but a huge long-term loss because of the inefficiency with which the authors use the tool.)
- Option 4 uses technologies like CSS and XML that may be new and unfamiliar. Authors need not be experts in those technologies but they should understand at least conceptually how those technologies drive their authoring tools. If they don't, they won't use the tools effectively because they won't understand why they're doing what they're doing.
- Option 4 demands a higher level of development rigor than many companies now follow. For example, authors must use a style sheet as is; they can no longer tweak a style a little bit "just this once." Authors must check documents into their CMS at the end of the day rather than waiting until tomorrow morning because "it's going to snow and I have to leave now before the roads get jammed," and so on.

So moving to option 4 will be difficult for many companies. If these companies don't plan to use or single source their material in ways that call for the structural rigor of option 4, they won't be able to justify it. Or if a company's culture doesn't emphasize technology, training, and rigor, the authors may adopt option 4 but will have trouble making it work. Instead, option 3 or even 2 may be the better choice.

In summary, your working definition of structured authoring should be based on the situation in which your company finds itself, not on one generic, forced definition. Only then can you start the process of picking authoring tools and creating structured material with confidence.

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This article originally appeared in the IEEE-PCS Newsletter.

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We want to integrate e-mail, the Web, phone calls, and face-to-face meetings to make volunteers feel connected and productive. Our far-flung teams can accomplish tasks more rapidly if people can talk, delegate, and gain energy from direct contact.

Committees could benefit a lot from virtual meetings, since regular meetings and individual phone calls take a lot of time. A recent initiative to make conference calling a key tool for committee work points that way. We want to be efficient, with every member of a group able to contribute. If conference calls help committees accomplish more in less time, our volunteers should be able to communicate that way.

My third proposal for more effective teamwork goes to the council'\'s structure. We should see if our chapter can accomplish more if officers hold their seats for two years rather than one. This change would allow team members space to formulate initiatives and launch new ideas while they administer current activities.

Most critically, team building takes time. You have to recruit and train volunteers and do a lot of other small tasks to get team members working together. It's satisfying, but labor-intensive, work. Under our current arrangement, we form a new team over the spring, summer, and fall. We launch our fall meeting schedule, and the team begins to click as we move into winter. That's when we start to form the next team! We recently moved from one-year to two-year terms for our council's at-large members. We should consider the same change for our officers.

This simple change in our bylaws would bring important improvements in the way we operate. Let me add some details. First, I don't make this proposal for my own sake. Much as I like this opportunity to serve, I'm not motivated to extend my own term. I should add that I haven't checked this proposal with our current first vice president, so I have no inkling what she thinks about it! In the end, we should evaluate this proposal jointly, independent of individuals' wishes.

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2007—2008 Program and Workshop Schedule

The following is the program and workshop schedule for the 2007—2008 season:

Programs

Date	Program Topic
December 19	How to Write and Publish a Book
January 16	ROI of User-centered Design
February 27	STACIES
March 19	Marketing Communications
April 16	Module Writing and Reusability
May 21	Online Showcase
June 11 or 18	End-of-Year Celebration

Workshops

Date	Program Topic
February 2	Usability (detailed class description to be available at a later time)
April 5	Structured Authoring

The *Broadside* Needs Your Input!

We're always looking for contributions from our readers. If you want to submit an article for publication, send it to Managing Editor Bryan Davis at: boston.broadside@gmail.com.

The following is the publishing and deadline schedule and for upcoming issues:

- **January** - Deadline is **Dec. 21**
- **March** - Deadline is **Feb. 22**
- **May -** Deadline is **April 25**

In general, the *Broadside* is published on the second or third week of the month.

Remember, the *Boston Broadside* is for our readers and by our readers, so it's what **you** make of it. Thanks!

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Second, we wouldn't want to create a four-step leadership ladder that requires people to commit eight years of service to our chapter. Rather, the president and the first vice president would each serve two-year terms. Terms for the immediate past president and the second vice president could be flexible and off the ladder. A key point of this change would be to make the president's position not at all honorary, but leader of a team that knows it will work together for two years.

Well, that's enough for one month. The rest of the council and I want to hear from you. Feel free to comment on this article or anything else related to our chapter's direction. Please write to sgreffenius@gmail.com, or call me at 781-223-1396.

STC's New Dues Structure Q&A

At its August 2007 meeting, the STC Board of Directors voted to change the Society dues structure. The STC office has put together a Q&A to help explain the changes to members. If you have questions, you can contact the STC's Lloyd Tucker.

The Q&A offers a wealth of information about the new dues structure and answers the most frequently asked questions about the changes, including:

Q: Why are my dues increasing?

A: Two reasons: the rising costs of running a non-profit organization and the new services and benefits STC is creating for its members.

The costs of operating a non-profit organization have gone up. The reasons include the effects of inflation, rising health care costs, rising costs of printing, and many other factors. Even if STC were standing still, doing the same thing year after year, we would have to raise dues to continue operating.

For more information, visit the STC's Q&A at: http://www.stc.org/membership/duesStructure02.asp

Chapter Membership Report

By Virginia Adams
Membership Committee Manager

We would like to welcome the following people who joined the Boston Chapter in August and September 2007:

Total STC Members: 14,706

Total Boston Members: 671

New Community Members (16):

- Kathy A. Barry
- Doug Bolin
- Elisabeth R. Carver
- Peter Desjardin
- Jennifer S. Dutton
- Ryan Freedman
- David Fox
- Susan J. Herrin
- Ron A. Kalman
- Elizabeth G. Labine
- Harry Lomas III
- Nancy Murphy
- Anne M. O'Brien
- Kate M. Pulnik
- Kathy L. Taylor
- David D. Ward

Get to Know the STC-Boston Member Profile/Resume Bank

By Barbara Casaly
Profile Bank Manager

You are probably aware of the Boston Chapter Job Bank, a member benefit capably managed by Bobbi Hennessey. But, you may not be aware of the Member Profile/Resume Bank or its potential benefits for finding jobs and networking.

About the Profile Bank

The Member Profile/Resume Bank addresses job search and networking interests of chapter members by allowing them to provide contact information, job status (seeking a job or not, and what kind of job), a short summary of skills and experience, and optionally a link to a resume in Word, HTML, PDF, RTF, or on a personal Web page.

This information is available to all visitors to the Boston Chapter Web site, particularly to people who go to the Web site to post or view jobs in the job bank. Search engines can also "crawl" the information, resulting in your summary and your resume appearing in search hit lists.

Posting Information

Available from the Careers menu on http://www.stcboston.org, the Member Profile/Resume Bank has three pages of profiles: all profiles in the bank, profiles of members who are seeking permanent employment, and profiles of members who are seeking contract employment.

To add your profile, go to the Careers menu, click Display Member Profiles, and select the Member Profile Submission Form. Log in as you would to access all member areas of the chapter website. Complete the Member Profile Submission Form. The Profile Bank Manager, currently Barbara Casaly, will notify you when your profile and resume are posted. after your profile and resume are posted, you will receive a standard e-mail every two months requesting updates to your information so that the information can be recycled to the top of the list or deleted from the list, if desired. By keep-ing the information current, the Member Profile/Resume Bank is a reliable source of information for hiring managers and recruiters and people who are interested in networking.

Words of Wisdom

Do not supply any contact information in your profile or resume that you do not want made available on the Internet. For resumes in Word and in PDF, check the file properties for accuracy (File menu, Properties or Document Properties). Search engines make use of file properties to index the page, and unintended information may appear in search results lists.

"At Your Service"

The Member Profile/Resume bank is a service to our members. Once you have submitted your information, you can request changes at any time by contacting the Member Profile/Resume Bank manager listed on the Web site (About Us, Chapter Contacts, Other Contacts). We hope that you find this service to be a valuable chapter benefit that you are able to use from time to time or on a permanent basis.

About the Society for Technical Communication

Mission: *Creating and supporting a forum for communities of practice in the profession of technical communication.*

For more information, visit us online at:

Society for Technical Communication

www.stc.org

Boston Chapter

www.stcboston.org

Writing Success Stories: Building Credibility Through Narrative and Numbers

By Bill Gruener

Many of our programs focus on tools or technologies; October's program was different. The guest speaker, Jonathan Kranz, focused on writing case studies which he equates to telling corporate success stories. The topic sounds like marketing writing, and indeed the topic was enthusiastically received by marketing writers. But, as former STC-Boston Council President Greg Bartlett notes, the principles of the case study method apply to writing technical documentation as well. At the end of the program, Greg shared these thoughts:

- The case study "template" (Challenge, Solution, Result) Kranz provided could be applied to extended examples in user documentation, thus making the content more compelling to the reader.
- The idea of identifying the goals of the user, the problems/challenges they might encounter, and the results they seek applies to user documentation, as well as marketing use cases.
- Just as marketing folks should move from a focus on listing and describing features in isolation to highlighting features as they relate to user goals, so too, should writers not focus on the software/hardware features in their documentation, but on the tasks the user is trying to accomplish.

Kranz, a marketing writer and the principal of a copywriting firm, said many of us perceive ourselves as technical—not marketing—writers focusing on the accurate description of features and not persuading users with hyperbolic promises. He argues that the essence of marketing writing is equal to the essence of technical writing.

Adding Value with Case Studies

Kranz noted that case studies combine the virtues of the testimonial and the story in an easily absorbed format. So, what can be a story? Kranz suggested the following:

- How your service works
- How your products help people
- How your business helped a specific person
- How you solve problems
- Why your business is relevant
- How your business began
- How you overcame a problem
- How you met a challenge
- Why your customers succeed
- Why your customers are happy

A well-documented case study provides credibility and simplicity in a one-effort task, he said.

Finding Stories for Case Studies

When looking for a case study, Kranz suggested that writers look within their groups or organizations for customers, sales staff, service staff/reps, field staff, engineers, and other experts. All of these potential sources possess the content for a good case study, he said, you just have to ask. But, you have to ask in the right way and explain why their participation is important. Tell them that they are the first point of contact with customers, so their knowledge and insights are indispensable to the program, he said.

Matching Your Message to Their Needs

Kranz also suggested that a writer should list their organization's know-how, the customers' needs, and then connect the dots. A good way to identify and match know-how to needs is to create a two-column table; Column 1 lists your expertise, "What makes us special"; Column 2 lists the client/customer needs (especially fears). When the raw list is finished, sort and match. The result is a list of how our "know-how-reduced time-to-market" production satisfied their "needs-just-in-time" products.

Developing the "Template": Challenge, Solution, and Result

In developing a case study template, Kranz offered the following guidelines:

Step 1: Challenge

Describe the challenge, which is context plus the problem faced. The key point: State the stakes. Challenges are negative-something to get rid of (increased production costs) or positive—something to obtain— (increased market share). Describe the context (who, what, where); state the desire (what is wanted), and emphasize the stakes (why it matters).

Step 2: Solution

State the solution, which is what you did about the problem. The key points: be specific, articulate actions, create a precise picture, and emphasize the "magic sword" that your organization brought to the challenge. When identifying the solution, think verbs, such as "increased," "decreased," "introduced," and "solved."

Step 3: Result

Emphasize the result, which is the payoff. The key point: Hear it from the client's mouth. Use real numbers. Get real quotes. Tie it back to the "desire-in-the-challenge."

Recycling, Repurposing

Finally, Kranz suggested using case studies in sales leave-behinds, inquiry follow-ups, trade show handouts, direct mail inserts, or press kits.

He also recommended case studies for Web content because stories are text, not images, and text is good for "spider food." This point is key because Web spiders can search text but not images.

Taking the Leap into Marketing Writing ... the New Frontier

By Ed Marshall

Marketing writing is a potentially new area for many technical writers. This article discusses how I adapted from a mindset of doing “developer documentation” to writing these types of documents, which added to my billable hours and income stream.

Possible marketing deliverables include white papers, corporate backgrounder documents, sales/news releases or press releases, data sheets, case studies, newsletters, etc. A new type of document becoming common is blogs written by CEOs, CTOs, and others.

These types of documents don’t to be just “marketing hype” but can be very informative and factual.

One of the most common types of marketing communications is white papers. Some of the basic tenets for white papers are:

- Use a problem/solution approach. State the problem (the customer's need or problem) and the solution (your company's solution).
- White papers are used to generate leads, demonstrate thoughtful leadership, and close sales.
- Keep to a usable length that people will read. For a typical white paper, three to four pages might be a good length. If you are documenting complicated processes such as configuring systems, 10 - 20 pages might be appropriate. White papers can also be used to document best practices (but those practices have to provide value).

The following is a typical outline for the most common use of white papers:

1.) Introduce your technology and your product.

2.) Summarize or briefly describe your product's highlights and benefits.

3.) Give examples of suggested workflows.

4.) Provide the system requirements.

5.) Supply complete contact information (company's URL, snail mail address, e-mail contacts, and phone numbers).

Recommended White Paper Resources

Some recommended resources for information on writing effective white papers are:

- *Writing White Papers: How to Capture Readers and Keep Them Engaged* by Michael Stelzner
- “Ethos and Exigence: White Papers in High-Tech” by D. R. Wilerton
- www.Whitepapersource.com
- “Effective Business Writing: the White Paper” by Anjana Srikanth on writerswrite.com

Other Marcomm Documents

Other common types of Marcomm documents include:

- Corporate backgrounder documents. List the company officers, history, location, products, target market, customer description, list of partners, contact info, investor info, contact info for news press, and Web site.
- Sales/news releases or press announcements. Provide announcements of a new product/version, highlighting the benefits of using or migrating to it. Companies love to include glowing quotes from reputable analysts, such as Gartner, Forrester, major customers, etc.).
- Data sheets. Provide product overviews, benefits, uses, list main features and their uses, system requirements, high-level feature description with benefits, pricing, availability, company history, and contact information.
- Case studies. Discuss a specific customer’s problem and how your company helped them solve it. Of course, you need permission from the customer to publicly identify them, but these are often a “win-win” for both you and your customer. Both parties get free advertising from these.
- Newsletters. Include timely articles on new developments in your technology space, short tutorials on using a particular feature more effectively, etc.
- Blogs written by CEOs, CTOs, etc. Provide timely articles on new developments in your technology space or insights by the authors on current and future trends.

How Marketing Writing is Similar to Traditional Technical Writing

To reassure those of you used to working in traditional technical writing environments, you don’t have to discard your finely honed writing skills to succeed in producing marketing literature.

The principles of good writing also apply to marketing writing, including:

- Organization. Although marketing documents are much shorter than the typical manual, they still need to have a good organization. As an example, use a cause-and-effect approach to describe a customer's problem and how your product helped them solve it.
- Tell a story. There needs to be a flow to your document. That is, Part B is a logical succession to Part A, and Part C follows Part B. Readers shouldn't have to wonder how you got from Part B to Part D. They might not know what's wrong, but they'll realize that something is missing.
- Write precisely and concisely. The audience for these types of documents likes to read less than our typical users. They want to skim and quickly reach a go/no-go decision about your product or company. The more precisely you write, the better your chance are of hooking them. Remember, your readers in this genre are likely to be CEOs, CIOs, or other high-level, extremely busy professionals.

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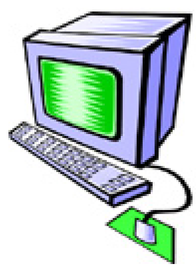
- Avoid marketing jargon and hyperbole. Ironically, despite the connotations of "marketing," you want to avoid marketing jargon. Just as software developers or programmers are leery of adjectives, especially superlatives (fastest, slickest, easiest to use, etc.), so are CEOs and CIOs. They are constantly bombarded by hyperbole via a variety of information sources, so just stating the facts in your writing is a powerful message to them.
- Use correct grammar. Even though your readers are likely to skim and not read every word you write, you want to use correct grammar, spelling, and punctuation. It's hard to quantify the negative feelings generated by errors but consider the weight of errors in documents that are only a few pages long. You want to generate confidence in your company and its products, so avoid errors.

How Marketing Writing Differs from Traditional Technical Writing

Some of the ways marketing writing differs from traditional technical writing include:

- Need to "sell a story," but be factual. You want to persuade, but do so with facts. Again, avoid marketing jargon and hyperbole whenever possible.
- New sources of information. Typically, your information comes from CEOs, Marketing, Sales, Web masters, graphics people, legal, etc.,—not your typical sources of information. So, you might need to be more organized in your interviewing or deal with different personalities than software developers.
- New audience. Most often your readers are CEOs, CIOs, CFOs, etc. Again, you need to consider their background, interest level, and technical knowledge in designing your writing for them.
- Increased use of company logos in the documents. You have to write more precisely because you don't have the full page. Think of the logo as having your typical front matter included in a four to five page document.
- High-quality printing common. Many of these types of documents are printed on high quality, glossy paper (i.e., expensive paper stock), unlike the common use of PDFs in the tech/com world.
- Tight deadlines. Tight deadlines seem to be the norm in this area. You are often making changes up to the last minute before you have to send the file to a print vendor, locally or remotely (in the case of trade shows or conferences). The challenge for marketing writers is to work fast but accurately under this type of pressure. It's hard to say, "It's not ready." to a CEO about to leave to fly to a trade show or a conference.



Benefits of Marketing Writing

So, why should technical writers leap into the world of marketing writing? Consider the following:

- For employees, performing increased duties across departments makes you more valuable to the company. For contractors, your income increases due to more billable hours. Either way, you increase your visibility in the company.
- Better understanding of your company's business and/or technology, which leads to "skills security, not job security."
- More contacts across other areas of the company. The more people you know, the greater your chances of getting referrals for jobs, either contract or staff positions.

If an admitted gearhead, such as the author, can do this type of writing, so can you.

Remember, visibility equals value!

The Broadside Staff

The *Boston Broadside* is published six times throughout the calendar year and would not be possible without the hard work of dedicated volunteers. Many thanks to the following people for their contributions:

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Thank you, everyone!

Write for the Broadside

The *Boston Broadside* encourages Chapter members to share their skills, thoughts, and ideas with other professionals in the Chapter.

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