What Do We Manage? A Survey of the Management Portfolios of Large Technical Communication Departments

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Agenda

- Background
- Quick review of the literature
- Methodology
- Results
- Conclusion and discussion
- Questions

Background

"To whom should the technical communication group report?"

"I need to justify my budget. Do any of you know of any formula for doing so?"

"What's the right ratio of technical communicators to programmers?"

"What's an industry standard template for information and content plans?"

"In my experience..." "AT MY COMPANY..."

Not

"According to such-and-such-a study."

Review of the Literature

While it is not fair to give the written instructions the entire credit for the improvement [technical advancements were introduced]...[These] comments regarding how the lights were kept is positive testimony to the value of the documentation

Cited in Loges, 1998, p.452

Now

- Justify technical publications
- Ensure that investment is really paying off

Measures

- Holistic: Process Maturity Model (Hackos)
- Effectiveness
  - Usability testing (not user-centered design)
  - Presence of features
  - Awards
  - Issues in defining
- Productivity
  - Page (or screen) rates
  - Tracking costs and schedules (like impact of changes at different phases of the production cycle)
  - Rough percentage of software development effort

Ultimately

Anecdotal

Methodology

- Exploratory
- Survey methodology
- Subjects
  - Top managers of technical communication groups with 20 or more staff (full- or part-time, regular or temporary)
  - Found through *snowball method*

Questions Asked

- What is the portfolio of projects managed?
- What is the percentage of effort spent on different types of projects (such as user's manuals, references, and tutorials)?
- What is the percentage of publications in print? Online? CD?
- What is the size of projects--in pages (print) or topics (online)?

More Questions

- How frequently are certain activities performed in the process of designing and developing information (such as needs analysis, task analysis, usability testing, and formal editing)?
- What is the project management model followed, such as a development project (a term coined for longer-term projects that are tied to a product development effort) or an agency project (a shorter-term project that is not directly tied to a product development effort)?

People Management

- What is the portfolio of skills managed in a technical communication department (such as writing, editing, instructional design, graphics, and technical support for publishing systems)? What are the proportions of such skills in a typical department?
- What is the size of departments? Ratio of managers to employees? Ratio of regular employees to contingent workers (contractors)?

Business Management

- How do technical communication departments ensure effectiveness of their work? How do they define quality? How do these definitions compare with those of their sponsors (a *sponsor* is the executive who can authorize or stop payment for a project (Robinson & Robinson 1989))?
- How do technical communication departments measure the productivity of their work? How do they define productivity?
- What are the perceptions of technical communication services within an organization?
- How do technical communication groups market themselves internally and externally?

More Business Management Questions

- How do sponsors pay for projects (fee for services, apportionment, or not directly charged?
- What are the reporting structures (that is, to which group within an organization do technical communication groups report, such as engineering, development, or marketing)?
- What is the general size of the department budget? (because some respondents might not be at liberty to state a specific budget, the survey will ask for budgets stated within ranges)?
- What is the general budget for capital expenditures? Staff training?

Results

- Spring of 2001
- 32 surveys mailed
- 26 responded
- No basis for generalization
- But basis for "transfer"

Project Management

Types of projects

- Post-sales material 68%. In order of production
  - —User's guides
  - —Reference manuals
  - —Help
  - —Service guides
  - —Support websites

More about Projects

- Marketing material: negligible (packaging, proposals, and marketing brochures, occasional projects)
- Training: less than 1%

Media

Print	51%
Online	48%
PDF*	38%
Video	Less than 2%
Audio	Less than 2%
Classroom instruction	Less than 2%

Quality Control Methods

Method	% of Organizations Using It
Technical reviews	100
Copyediting	81
Substantive editing	81
Functional testing	80
Usability testing	54
Marketing (department) reviews	46
Legal reviews	46

Most Significant Quality Assurance Methods

1. Technical reviews
2. Functional testing

Usability

Percentage of Products Tested	Percent Reporting
100 percent	12
75-99 percent	0
50-74 percent	4
25-49 percent	4
11-25 percent	0
10 percent or less	26%
No response	52 percent

Definitions of Quality

- Customer satisfaction (24%)
  - "Users of our products can do their jobs and are overall satisfied with our documentation."
  - "[We] survey clients at phase gates" to assess their satisfaction
- Meeting needs (24%)
  - 8 percent define that as meeting customer needs, 4 percent as meeting users' needs
  - 4 percent as meeting needs defined by the International Standards Organization (ISO)

Definitions of Quality

- Meeting needs (24%) (continued)
  - 4 percent as "industry standards coupled with client standard,"
  - 4 percent merely as "meeting requirements" (whose aren't stated)
- 1 organization: "Understanding the customer, customer expectations and meeting them without error on time."

Productivity

Measure	Percentage of Organizations Using It
Page rates	27%
Size of pages	12%
Scope of effort (revision versus new)	27%
Screen rate	12%
Planning Effort	8%
Word counts	4%
Billable rate	4%
Number of jobs completed	4%

Productivity Rates

- Only 16 percent consider these to be a trade secret
- 42 percent share productivity rates with sponsors

People Management

- Staff size: 12-156
- Median size: 31
- Full-time: 96%
- Contingent workers: 7.36 workers (average) (one had 20 permanent and 40 contingent workers)
- 62% hire part-time staff

Skills

- Technical writers

- Project management
- General management (supervisory and business responsibilities)

- Editors
- Production staff
- Illustrators
- Usability specialists
- Trainers
- Graphic designers
- Instructional Designers

Staffing Trends

- Past Year
  - —40 percent of the organizations grew
  - —36 percent stayed same
  - —24 percent shrunk.
- Coming Year
  - —32 percent anticipated growing
  - —48 percent anticipated staying the same size
  - —20 percent anticipated shrinking

Training Topics

Tools	34.9%
Technology about which the technical communicators write	22.4%
Professional communication	19.1%
Professional development	11%
Management	8.1%
Industry	2.1%
Other	2.4%
Total	100%

Conferences

Conference	% Sending Someone
STC	64%
WinWriters	16%
Center for Information Development Management (CIDM)	16%
American Society for Training and Development (ASTD)	12%

Business Management

Job Title	Percentage of Organizations Using It
Technical writer or writer	57%
Information designer or architect	27
Software engineer	4
Multiple titles (writer, engineer, knowledge analyst)	4
Analyst	4
Not reporting	4

Organization Name

Organization Title	Percentage of Organizations Using It
Technical Publications, Communications, or Information	38%
Information Design or Development	19
User Assistance, Education, or Technology	12
Documentation	12
Knowledge Services	8
Creative Services	3.5
Consulting Company	3.5

Reporting Structures

Organization that the Technical Communication Group Reports To	Percentage
Development	42%
Independent agencies (not in a corporation)	2
Marketing	8
Operations	8
Technical Support	4
Other	15
Not reporting	11

Title of "Boss"

Title of the Individual to Which the Technical Communication Group Reports	Percentage
Vice-President	34%
Director	31
Manager	15
General Manager	4
CEO	4
No boss	4
Not applicable	4
No response	4

Content Approval

Title of the Individual or Group Who Approves Content	Percentage
Development or Technology Group	42%
Technical Support	8
Quality Control	8
Client	11
Technical communication group	15
Depends on the project	4
Self	4
No response	8

Budget Approval

Title of the Individual to Who Approves the Budget	Percentage
Development or Technology Group	46%
Chief Financial Officer (or a manager in Finance)	19
Publications	4
Client	8
Client Care	4
Executive Director	4
No response	16

When Budgeting Occurs

When Budgets Are Prepared	%age
After storyboards are prepared	4%
After outlines are written	7
Before information planning occurs	31
Do not prepare budgets	31
No response	27

Accuracy of Budgets

Trends in Actual Budgets	Percentage
Off—11 to 20 percent of estimates	4%
Somewhat off—5 to 10 percent of estimates	4
Slightly higher—3 to 5 percent of estimates	4
On target—within 2 percent of estimates	46
Slightly lower—less than 2 percent of estimates	7
No response	35

Note about Budgets

Few included printing or duplication costs.

Funding

Apportionment:	31 exclusively. 8—represents 95 percent of funding.
By the project (but not competitively bid):	8
By the project (competitively bid)	4 (another 4 percent receives 50 percent of its funding this way)
Fee-for-service:	8% Another 8 percent receives more than 50% of its funding.

Expenditures

Trend	Percentage of Organizations
Increased beyond the inflation rate	31%
Increased at the inflation rate	8
Increased below the inflation rate	4
Stayed the same	23
Reduced	15
No response	19

Planning Schedules

Before information planning	50
No response	31
After outline	11
After storyboards	4
Do not prepare schedules	4

Accuracy of Schedules

Off—11 to 20 percent of estimates	4
Somewhat off—5 to 10 percent of estimates	15
Slightly higher—3 to 5 percent of estimates	23
On target within—2 percent of estimates	46
No response	12

Marketing

Only 3 percent have formal marketing programs

"Not Much. Generally our group is respected and well-known. But I'm anxious to learn what others do."

Reader's Comment Forms

46% use

- **38% report a 1% response rate,**
- **4% report a 3%response rate**

Discussion and Conclusions

Limits of the research

- **Limited population, not generalizable**
- **Some questions misunderstood (PDF), others not answered**

About Project Management

- **Projects fall into "traditional" realm of technical communication**
- **Print is still a viable medium**
- **Quality control**
  - **All organizations had a defined process**
  - **No standard definition**
  - **No standard metric to track**
  - **Extremely limited use of usability testing (but what about user-centered design?)**

About People Management

- Technical writing is the dominant skill
- Management is a distant second
- Editing, illustration, graphic design, instructional design, and usability have limited roles

More about People Management

- Even in good times, staffing is constrained
- Training tends to be tactical, perishable

About Business Management

- "Technical" remains a dominant part of the job title despite efforts to change that over the past 25 years
- Although more groups reported to Development, less than half did
- Most technical communication groups report to an executive

More about Business Management

- Budgeting and scheduling occur late in the process, could have implications for efforts to promote early involvement
- Budgets and schedules tend to be accurate
- Marketing of services is almost non-existent

Future Study

- Replicate this spring
- Include smaller departments (10 and above)
- Shoot for generalizability