

# STEPS & SPECS

Vol. 5, No. 2

The newsletter of the STC Policies and Procedures Special Interest Group (SIG)

June 1999

## Management and Formatting Top P&P SIG LISTSERV Postings for Fiscal Year

By Audrey Cielinski Kessler

Issues related to the management and formatting of policies and procedures documents topped the list of subject-matter categories posted and discussed on the SIG's LISTSERV during fiscal year 1998-1999.

Five postings were made related to management, and four were made regarding formatting issues. Management issues ranged from benchmarking to reduce paper count in documents to establishing a company's documentation hierarchy. Formatting issues ran the gamut from formatting organizational charts to uniquely numbering of two entities within the same document.

The next most popular topic category was a three-way tie among style, training and software, with three postings in each topic category. Least common topics were related to editing, procedures, policies and hardware, with one posting in each topic category.

Four other posting topics

fell into the "other" category. These ranged from a request for salary information for a specific job description to new physics product warnings.

The variety of topics posted on the LISTSERV indicates a broad range of interests among the P&P SIG's membership. I encourage you to continue posting questions and issues to the LISTSERV as the discussion these postings generate can help all our members become better informed about a wide spectrum of P&P topics and by so doing become more effective policies and procedures professionals.

### Number of LISTSERV Postings, by Topic Category

Topic Category	No. of Postings
Editing	1
Formatting	4
Hardware	1
Management	5
Other	4
Policies	1
Procedures	1
Software	3
Style	3
Training	3

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## A Year in Review

By Audrey Cielinski Kessler

As the fiscal year draws to a close, it is appropriate to take stock of what the Policies and Procedures SIG has accomplished during the 1998-1999 fiscal year and acknowledge the volunteers who helped make it all possible.

**Membership.** SIG membership at the start of the fiscal year was 497. As of March 31, that figure had risen to 640, for an increase of 143 members, or 28.8 percent. To gauge the interests of new members and to recruit SIG volunteers, a new-member response card was added to the packet sent to new members. Of the 180 cards sent to new members, eight were returned for a response rate of 4.4 percent. Three other members responded after an article about the card (along with a reproduction of the card itself) appeared in the SIG

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# Heavenly Automation

By John Gear

The new automated procedure systems makes me reflect on the successes - and failures - from applying new technologies to systems and organizations. The problems new technologies present are often fiendishly complex - and can completely absorb your attention and resources, destroying any productivity increase you hoped to attain.

All technology has strengths as well as weaknesses, costs as well as benefits. But since so few people question the worth of new systems, a skeptic's approach has great value. There is nothing worse than being sold a vision of an automated paradise only to have it turn out to be a time and energy-draining hell of disrupted routines and compulsory reorganizations as you scramble to force people to fit the technology instead of shaping the technology to fit your people and procedures.

Surprisingly for such an old book, the Bible includes a lot of great advice on buying computers and office technology. Here are some of the points to keep in mind as you consider automating your procedure systems.

**"Vanity of vanities, all is vanity."** Keep this in mind whenever you consider a new office computer, extension, or upgrade. As you listen to salespeople and

your own employees agitating for the "next new thing," repeat "all is vanity" softly to yourself. Listening to these "Wizards that peep and that mutter" can cause you to lose sight of the fact that, for every benefit, there is a cost that must be weighed. Remember to "Beware of false prophets, which come to you in sheep's clothing, but inwardly they are ravening wolves."

**"The sleep of a laboring man is sweet."** In history the opposite point may not have needed saying, but it certainly does now. I would phrase it as "The sleep of the owner of excessive labor-saving systems is troubled." Your business already rents the services of some of the most sophisticated computers in the universe - the brains of your procedure developers. Properly employed, these computers are flexible, creative, and powerfully productive.

When thinking about silicon-based systems, remember to compare them to the low-capital investment carbon-based systems you already have available. There are tasks for which only computers are well-suited, and there are a "multitude of multitudes in the valley of decision" of tasks that people are better for. Always remember that it is far easier to redirect the

*See AUTOMATION, p. 5*

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# Calling All P&P SIG Members!

We'd like your feedback and suggestions on how to improve STC's Policies and Procedures Special Interest Group. Please complete this form and mail it to the address indicated on the back of the form. Or, you can fax this form to **Audrey Cielinski Kessler** at (330) 677-8598 or e-mail her at **AudCK@aol.com**. We look forward to hearing from you!

Name \_\_\_\_\_  
(First) \_\_\_\_\_ (Middle Initial) \_\_\_\_\_ (Last) \_\_\_\_\_

Address \_\_\_\_\_

Telephone (W) \_\_\_\_\_ Telephone (H) \_\_\_\_\_

E-mail \_\_\_\_\_ Fax \_\_\_\_\_

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### My interests are (Check all those that apply)

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Administration         | <input type="checkbox"/> Marketing            | <input type="checkbox"/> Professional Development |
| <input type="checkbox"/> Documentation          | <input type="checkbox"/> Membership           | <input type="checkbox"/> Publications             |
| <input type="checkbox"/> Information Technology | <input type="checkbox"/> New Member Relations | <input type="checkbox"/> Workshops                |
| <input type="checkbox"/> Job Listings           | <input type="checkbox"/> Newsletter           | <input type="checkbox"/> Web Page                 |
| <input type="checkbox"/> LISTSERV               | <input type="checkbox"/> Programs             | <input type="checkbox"/> Other (Specify) _____    |
- 

Comments/notes \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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### Yes! I'd like to help with the following team(s)

- |  |  |
|--|--|
| <input type="checkbox"/> Membership          | <input type="checkbox"/> Newsletter  |
| <input type="checkbox"/> Public Relations    | <input type="checkbox"/> Chapter-Level SIG Liaison                                 |
| <input type="checkbox"/> Web Page            | <input type="checkbox"/> I can't help now, but keep me in mind for future projects |
| <input type="checkbox"/> Programs & Projects | <input type="checkbox"/> I'd like more information about the _____ team(s)         |

Comments/notes \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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### My areas of P&P expertise are

- |  |  |
|--|--|
| <input type="checkbox"/> Instruction Design/Training | <input type="checkbox"/> On-Line Help          |
| <input type="checkbox"/> ISO 9000 Documentation      | <input type="checkbox"/> On-Line Documentation |
| <input type="checkbox"/> User Manuals                | <input type="checkbox"/> Marketing             |
| <input type="checkbox"/> System Manuals              | <input type="checkbox"/> Other (Specify)       |
| <input type="checkbox"/> Policy Documentation        |  |

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My P&P areas of interest are \_\_\_\_\_

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I would like to see a newsletter article about \_\_\_\_\_

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I would be willing to write a newsletter article about \_\_\_\_\_

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Other comments \_\_\_\_\_

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Audrey Cielinski Kessler  
STC Policies & Procedures SIG  
1638 S. Lincoln Street  
Kent, OH 44240-4449

actions of a person than a machine.

**"The race is not to the swift, nor the battle to the strong."** In other words, the latest technology, the fastest processor, the greatest memory, and the most ex-

**"Your business already rents the services of some of the most sophisticated computers in the universe - the brains of your procedure developers."**

pensive software, will not help you produce better procedures if you're not doing the right things. Computers don't just give us expanded capabilities - they also force us to accept their conventions and limitations, and they impose a certain structure on the work. The things your software makes easy, you will do; the things that your software makes hard, you will not likely do.

**"Evil communications corrupt good manners."** I believe that this is history's first warning about the difficulty of writing specifications for computer systems (not to mention the problems you have in interviewing people to document their processes). This is absolutely the most critical -and

least well-understood aspect of introducing new office systems into your operation. The well-publi-

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**"In other words, the latest technology, the fastest processor, the greatest memory, and the most expensive software, will not help you produce better procedures if you're not doing the right things."**

cized disaster stories about government computer upgrades are only the tip of the iceberg, private companies being loathe to publicize their similar stories. But they are all rooted in poor communications between buyer and seller.

The only way to succeed in computer contracting is to follow the Biblical admonition, "For precept must be upon precept, precept upon precept, line upon line, line upon line, here a little, and there a little." That means that there is just no way to shortcut the process; there is no magic wand you can use to generate accurate and enforceable specifications. You have to be willing to sit and grind out a specifications document that spells out, in detail, line upon line upon line, exactly what the system will do for you.

**"Wide is the gate, and broad is the way, that leadeth to destruction, and many there be that go in thereat."** In other words, automating and upgrading foolishly are the easiest things in the world to do - and many people do, usually because they violate the warning about specifications. If you find yourself thinking about your automation project and saying, "Gosh, this is just so darn easy,"

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**"You have to be willing to sit and grind out a specifications document that spells out, in detail, line upon line upon line, exactly what the system will do for you."**

make sure to consider it a warning - make sure you're still heading toward the narrow gate.

**"Woe unto them that call evil good, and good evil."** It's amazing how many companies are unwilling to tell the truth about their latest system acquisitions. They figure it's far better to live with a mistake than to admit that the new wonder system isn't all that wonderful. This is not only terribly corrosive, it is foolish, because all it does is

*See AUTOMATION, p. 8*

newsletter. Credit for designing the card and preparing and sending the new-member packets each month (an average of about 40 per month and a high of 85) goes to team member Joy Osaka-Lu. Coordinator of the team was Jerry Laing.

**Newsletter.** The newsletter continues to published on schedule each quarter with many interesting and helpful articles. Article contributions from members are always welcome, and you are encouraged to share your knowledge and insights with your fellow SIG members. The newsletter was entered in the society's 1998-1999 newsletter competition and won an award for Excellence. Newsletter production was a team effort, led by Michelle Anderson and assisted by Susan Sereno (layout) and Luette Arrowsmith (editorial).

**LISTSERV.** As of April 1, LISTSERV subscribers totaled 292. Traffic tends to be sporadic. Subject matter of the topics is varied and interesting, with each posting generating a fair number of responses. Coordinating the LISTSERV is SIG manager Audrey Cielinski Kessler.

**Public Relations/Web Page.** In addition to the ISO 9000 FAQ already posted to the SIG's Web site, others are in progress and will be posted when ready. New for the team this year was entry

of the SIG's Web page in the STC public relations competition. The page was not among the award winners, but the feedback it received will be used to improve the chances of next year's entry. The Public Relations team was led by Nancy Ford Demeter. The Web page was coordinated by Kris Henige.

### Chapter-Level SIG Liaison.

Activities of the Chapter-Level SIG Liaison team included the contacting of other SIGs to exchange linked ideas based on topical interests suggested by questions posed by members using the P&P SIG's LISTSERV. The networking of the P&P SIG with other society SIGs through LISTSERV activity is in progress. An analysis of P&P SIG LISTSERV activity also was undertaken. The results showed that a variety of topics were discussed, responses were timely and

effective, and responses were posted within 12 to 72 hours of the original posting. The analysis was done to show market the value of the P&P SIG to other SIGs. The SIG was led by Elizabeth Turpin, Ph.D.

### Programs & Projects.

The Programs and Projects team, absent a team leader for the entire fiscal year, still needs someone to take the reins.

It has been a busy and eventful year. I'm confident that with the SIG's talented team leaders and team members, next year's accomplishments will meet or exceed the ones we have seen this year.

**Audrey Cielinski Kessler** is the owner of The Write Hand, a writing, editing and desktop publishing company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC and manager of the P&P SIG.

## HELP WANTED: NO EXPERIENCE NECESSARY

The P&P SIG has the following openings for Team-Leader positions: Programs & Projects; Chapter-Level SIG Liaison

**Job Requirements:** Interest in helping your SIG  
Desire to learn and get involved  
Enthusiasm

**Experience:** None required

Each position can be filled with one person or with two people serving as co-team leaders. Help is always available and is as close as your computer or telephone. So even if you think you lack the background to fill one of the openings, don't let that stop you from volunteering. To volunteer or for more information, contact your SIG manager, **Audrey Cielinski Kessler** at **[audck@aol.com](mailto:audck@aol.com)** or call (330) 677-8598.

## P&P LISTSERV Posting Titles, by Topic Category

### *Editing*

- Editing your own work

### *Formatting*

- Formatting organizational charts

- Unique numbering of two entities in the same document

- One-page-policy format—is it a trend?

- Procedure format and style

### *Hardware*

- Selecting a monitor

### *Management*

- Benchmarking for reducing document page count

- How to educate non-technical writers about what a technical writer does

- Customer satisfaction survey for documentation services

- Guidelines for documentation residing on an Intranet

- Establishing a company's documentation hierarchy

### *Other*

- Salary information for a specific job description

- Y2K humor

- New physics product warn-

ings

- Formation of self-help group for API documentation writers

### *Policies*

- The “why” of corporate policies

### *Procedures*

- Documenting procedures

### *Software*

- Ventura 8 vs. FrameMaker

- “Smart” (intuitive) on-line reference software

- Suggestions for software for scanning forms

### *Style*

- Style guide recommendations

- Use of pronoun (you) or (job) title in a software application's on-line help

- Procedure format and style

### *Training*

- FrameMaker training

- Change in dates for UCLA P&P course

- Courses in policies and procedures

## P&P Membership Report

By Jerry Laing

This report reflects SIG membership changes from January 1, 1999 through April 30, 1999. The P&P SIG has sustained a steady growth in membership despite the usual February drop resulting from STC non-renewals. Since the beginning of the year, we have gained 294 members, bringing our current membership to 695. While the names are too numerous to list, it is interesting to see where our new SIG members call home. Membership, by country or continent is as follows:

Asia	1
Australia	2
Canada	37
Europe	17
United Kingdom	2
United States	235

If you have any questions or suggestions regarding your P&P SIG membership, please feel free to contact me at [jal\\_docs@pacbell.net](mailto:jal_docs@pacbell.net) or call me at (626) 445-0100.

*Deadline for the September 1999 issue:  
August 15!!!*

*Please email [Michelle\\_1962@yahoo.com](mailto:Michelle_1962@yahoo.com) with articles*

firmly tie the bad system to your reputation.

If you aren't sure whether your new system is everything you said it would be, then for Pete's sake don't redouble your efforts to resell it to your people. Just start keeping track of what the problems are, start fixing the ones you can, and keep quiet. Otherwise people will think of you when they hear "As the crackling of thorns under a pot, so is the laughter of a fool."

**"Of making many books there is no end; and much study is a weariness of the**

**flesh."** It turns out we're all finding out that the cosmic joke of the computer age is the idea of the "paperless office." Anyone who has suffered through the introduction of a new computer system can tell you that the only thing worse is trying to do it without sufficient documentation. Procedure folks even have a golden opportunity to make systems acquisition work. Rather than trying to develop the new procedures once the system is on board, sit down with the user representatives and write up the procedures you'd like to implement when the system arrives.

Then use those to write the functional specifications. It may sound bass-ackwards but it's really nothing more than taking the idea of "Begin with the end in mind" and applying it sensibly.

John Gear is principal of Catalyst Consulting Services, "Thinking beyond boundaries, results beyond compare." You can reach him at 360/694-8044 or catalyst@pacifier.com



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## STEPS & SPECS

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*The mission of the Policies and Procedures special interest group is to assist STC members in developing, implementing and managing policies and procedures communication through educational and networking opportunities, STC conference sessions and publications, and communication with other STC SIGs and professional organizations in areas of common interest.*