

Establishing Policies and Procedures in a Matrix-Management Consulting Company: Part II

By **Katharyn Bine**

Editor's Note: In the December 1999, issue Katharyn Bine discussed how she and her colleagues promoted and implemented policies and procedures in a matrix-management environment. Matrix management allows a project manager to create teams for projects that require input from several business units. In this issue, Katharyn will discuss the specific steps the group took to "sell" the idea and make the User Information Products Group an integral part of the company.

Information Leafblowing

The days after the Tech/Comm 1999 conference were filled with writing – the objectives, the mission statement, explanations as to why this was more than a morale-boosting effort. We started by writing a list of objectives, which totaled about 40 items. Some examples:

- Produce better software requirement documentation
- Better understand the client's goals for the end user
- Better understand the end user's tasks and goals
- Convince the client to

accept the matrix-management concept

- Develop better information for estimating hours and costs for user information products

From the list of objectives, we wrote our mission statement:

ICF Consulting's User Information Products workgroup writes, edits, programs, illustrates and produces training, printed and electronic documentation for the software and hypertext systems developed by ICF Information Technology. We evaluate the usability of ICF's software and hypertext systems as well as the usability of our own work. We support the use of knowledge-management systems. User information products include user instruction manuals, Microsoft Windows and Lotus Notes-based online help systems and online and hypertext systems for Internet and CD-ROM distribution.

Management needed to

See *ESTABLISHING P&P*, p. 2

Happy New Year from STEPS & SPECS

By **Michelle Anderson**

Now that the party hats and champagne glasses are put away, and New Years' resolutions have been made (and no doubt already broken), I'd like to tell you about all the new and exciting things to look forward to this New Year with the P&P SIG's newsletter.

First comes a new beginning. I am stepping down as editor to focus on personal and professional goals. Lurette Arrowsmith will take the helm as editor. Lurette was formerly the newsletter's co-editor and is looking forward to receiving your article ideas and submissions. Please email her directly at larrowsmith@usg.com Lurette brings 10 years of experience in policies and procedures to the table, and is sure to keep the SIG's momentum going.

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know what was in it for them, and why our effort was important to us and to the company's success. We presented our mission statement to them with an explanation:

The stated goal for ICF Information Technology is to grow by 30 percent in the next two years. As a result of that growth, the technical writing staff will need to produce more or larger user information products such as online help, system documentation and user documentation. Our objective is to institute a business process and standards to do the following:

- Ensure that system requirements documentation is produced at the outset of each software development effort
- Track and control costs
- Develop improved estimates of work hours
- Obtain information about a system's end users to ensure that the documentation meets their needs
- Maintain and improve the user interface of electronic user information products
- Provide feedback to developers with the goal of improving user interfaces and reducing errors in software
- Establish working relationships with soft-

ware developers, end users and clients

Benefits of a standard approach are as follows:

- Two or more technical writers may be used on a single project.
- Productivity can be measured and quantified for estimating costs and managing projects
- Redundancy in skills among the members of the User Information Products workgroup reduces or eliminates problems that can arise when the sole person with a particular skill is absent.
- ICF Information Technology is better qualified for project management.
- By including technical writers in the early stages of the software development process, ICF Information Technology can ensure better documentation and overall product usability.

Much of the information in the group's planning documents is of interest only to its members; however, the most useful part of the planning document at the beginning stage are the goals, which are outlined below in terms of short- and long-term objectives:

Short-Term Goals (next six to nine months)

- Solicit support from senior management and

See ESTABLISHING P&P, p. 3

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be sure that they are aware of the group's achievements and understand the value of its efforts.

- Develop a mission statement to determine the group's goals.
 - Develop preliminary marketing information for internal ICF Consulting use
 - Join the Society for Technical Communication and begin evaluating award-winning materials from the organization's publications competition.
 - Determine whether any ICF employees are members of the American Society for Training & Development, and evaluate the benefits of joining the organization.
 - Institute quality assurance procedures such as style sheets and templates so that user information products have a consistent appearance and treatment of content.
 - Develop presentations for management, for ICF Information Technology in general and for ICF Consulting in general. A schedule for when these events will occur needs to be determined; however, none will happen in the next month.
 - Review the workload of

each of the group's technical writers now and for the past six months, including total billable hours and subjective evaluations of recent past projects.

Long-Term Goals (next nine months to two years)

- Develop a business process to describe how the technical writing staff can work closely with the software development staff to ensure the accuracy of user information products and services.
- Identify a software development team of two to four people who are willing to try the new business process.
- Assist in the development of a knowledge management system for ICF Consulting.
- Enter materials in the Society for Technical Communication's publication's competition for evaluation.
- Pursue business partnerships with companies such as Enigma (knowledge management software) and Adobe (Acrobat).
- Establish productivity performance measures for the User Information Products workgroup.

- Use metrics to better estimate the cost of products.
- Determine the effectiveness of the materials the User Information Products workgroup produces.
- Obtain information from clients to measure their satisfaction with the group's products.
- Evaluate the results of implementing quality-assurance procedures.
- Enhance the group's professional skills.
- Identify new software tools and the training necessary for the development and long-term productivity of the User Information Products workgroup.
- Copresent with Saul Carliner at next year's Tech/Comm on our experience selling and implementing a User Information Products workgroup within the organization.

Katharyn L. Bine has 13 years' experience developing Internet, electronic and printed products. She has developed training materials and implemented orientation and training sessions for software products, and has taught courses at George Washington University and the U.S. Department of Agriculture Graduate School.

*Deadline for the June 2000 issue:
May 15, 2000!!*

Please email Larrowsmith@usg.com with articles

Second, policies and procedures are sure to be well-represented at this year's STC conference in Orlando, Florida (May 21-24). According to the preliminary program for the conference, no fewer than seven P&P-related workshops are scheduled, with topics ranging from P&P development to audience analysis and the ISO 9000 document hierarchy. There is even a post-conference workshop scheduled for flowcharting policies and procedures, presented by Raymond Uργο, the Assistant to the STC's President for SIGs.

Check the STC Web site (<http://www.stc-va.org/47thConf/47conf.htm>) for the most current information about the conference, including workshops and registration information.

I have enjoyed my two years as editor of this newsletter. I have met some wonderful people and learned many things. I would like to personally thank each of you for making the Policies and Procedures SIG one of the most successful in the STC.

On behalf of our SIG manager and the STEPS & SPECS newsletter team, I would like to wish all of you much health and success in the year 2000.

P&P SIG Gets 59 New Members

By Joy Osaka Lu

This report reflects SIG membership changes as of January 31. Membership in the Policies and Procedures SIG continues to grow. As of January, the SIG had 59 new members.

USA	50
International	9
India	1

This brings our total membership to 906!

If you have any questions or suggestions regarding your P&P SIG membership, please feel free to contact Joy Osaka-Lu at JLJO@aol.com.

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.