

Professional Development Short Course On:

Improving Technical Writing For Systems Professionals

Instructor:

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WORKSHOP OBJECTIVES

- ▶ Understand why PLANNING is the most critical step in the writing process
- ▶ Know how to plan any writing task to make it EASIER TO GET DONE, MORE QUICKLY
- ▶ Know what READER-CENTERED WRITING is and how to perform an audience analysis
- ▶ Understand why TONE is so critical in business writing and the do's and don'ts of tone
- ▶ Know why OBJECTIVE SETTING is crucial to writing success, and how to write a Purpose Statement and use it in the document itself
- ▶ Know how to determine THE READER'S INFORMATION NEEDS and meet those needs, without giving too much or too little information
- ▶ Be able to ORGANIZE YOUR DOCUMENT TO GET THE RESULTS YOU WANT
- ▶ Have the skills needed for EDITING, REWRITING, AND PROOFREADING your documents
- ▶ Understand what is needed to make your documents look as POLISHED AND PROFESSIONAL as possible
- ▶ Understand the STRUCTURE AND FORMAT of the types of documents you will be having to write

CLARIFYING YOUR THOUGHT PROCESSES BEFORE WRITING

Research studies show that the **single biggest cause** of writing problems is inadequate attention to planning one's writing.

Before writing, **ALWAYS** think about questions like:

- ▶ **Who** is to read this document?
- ▶ What do **they** want to know?
- ▶ What result do **I** want to accomplish as the writer?
- ▶ How should the document be structured to meet **BOTH my AND their** needs?

TWO CRITICAL PRINCIPLES OF COMMUNICATION

1. ***YOU must take FULL responsibility for the success of your message***

- ▶ It's your job -- not the recipient's -- to get your message understood
- ▶ It's your job to find out what the recipient can and cannot understand, what language he/she will be able to make sense of
- ▶ By taking **100% responsibility**, you gain control of the only part of the communication process you can control -- your own part!
- ▶ You can no longer play the "Victim" role -- "Oh, poor me! Why don't people understand what I say when I write to them?"
- ▶ If your message does not get the results you want, it's your job to figure out why not -- for instance, why it was misunderstood, why it offended the reader, was considered an inappropriate request, etc.

TWO CRITICAL PRINCIPLES OF COMMUNICATION

2. *You must structure your message so it meshes with the RECIPIENTS' thought processes*

- ▶ What are their most common thought processes for receiving and understanding your information?
- ▶ What way is most likely to work to persuade them -- to get them to:
 - act on your ideas
 - accept your proposals
 - buy into your recommendations

1. UNDERSTANDING THE PEOPLE INVOLVED

WHAT PEOPLE ARE INVOLVED?

- ▶ Who are they? Are they in IT? Business users? Which business?
- ▶ How often have *you* written to these readers? What level of credibility do you have with them? Your boss? Your unit?
- ▶ How familiar are they with this subject? From you? From others?
- ▶ What background information do they *already have* on this subject? What do they *lack*?
- ▶ What is their level of *technical* knowledge/sophistication?
- ▶ What are their special interests or concerns regarding this subject?
- ▶ What depth of coverage are they expecting/do they need?

Relationships

- ▶ What is your relationship to these people? Your boss's? Your unit's?
- ▶ What history is there?
- ▶ What organizational or "political" issues are involved?

SUCCESS THROUGH READER-CENTERED WRITING

This means:

- ▶ writing from your audience's perspective, not your own
- ▶ writing in language your reader can understand.

Why is this so hard for most people in IT?

- ▶ We tend to write from "inside our own IT world":
 - We use our own specialized systems lingo, jargon, acronyms...
BUT . . . will our reader understand them?
 - We have certain technical background knowledge...
BUT . . . is that knowledge familiar to our reader?
 - We make assumptions...
BUT . . . does the recipient share them?
 - We have our own needs, objectives, interests....
BUT . . . does the reader have totally different ones? And are they compatible or in conflict?
- ▶ We don't always take time or make an effort to know the audience well enough, to learn enough about "their world" (their business needs) to be able to address their concerns and interests
- ▶ Our audience is not "right there," so we default to writing to ourselves
- ▶ When we re-read/edit, we focus on how clear we seem to ourselves, not to the reader who is outside of IT
- ▶ We take as paramount our own IT business needs and priorities (me, my unit, my systems area)
- ▶ We routinely tend to focus on the technology issues (whether hardware, software, interconnectivity, etc.)

PUT YOURSELF IN THE READER'S SHOES

- ▶ Imagine you were the recipient -- what do you want/need to hear?
- ▶ Key technique for being reader-centered:

Let's say you're writing a memo -- put yourself in the reader's shoes, by asking questions like:

- *"What questions will this (these) reader(s) have as he/she/they read this memo? How can I answer their questions?"*
 - *"If I were the recipient of this memo, which sequence of information would most convince me -- that is, what point first, second, etc.?"*
 - *"What objections, doubts, or worries might readers have as they go through my ideas? How can I incorporate these into my memo -- or even better, show them that I've already taken account of these concerns of theirs?"*
- ▶ One way to put yourself in the your reader's world is to remind yourself of some questions likely to be on their minds -- for instance:
 - *Why* do I need to know *all this* information? What am I supposed to do with it all?
 - What is the *significance* of the problem addressed? Why should I care about it?
 - What is the *value-add* of the writer's recommendations/ conclusions?
 - What am I supposed to do with the results of this investigation?
 - What happens next? How am I involved?
 - What are the other issues involved? What does this connect with?

WHEN YOUR AUDIENCE IS **NOT** I.T. PROFESSIONALS . . .

Why is communication especially difficult between IT Professionals and line of business professionals? Check all that apply to you or your colleagues:

- 1. Because most of what we write about is highly specialized, we write for those who know what we know -- and business recipients usually know a lot less
- 2. We have to communicate with **both** technical and business audiences, and they typically have different needs, interests, purposes....and we're not particularly aware of what these are
- 3. These audiences also differ from us in background knowledge, language they're familiar with (jargon they use, terminology), etc.
- 4. The IT professional may know little or nothing about the business realities of the reader -- products/services, customer needs, regulatory constraints, etc. -- and may not even know how to find out about the reader's world
- 5. At worst, the IT professional doesn't even know how little he/she knows
- 6. System information **is** inherently very detailed -- and we're not used to presenting "the big picture," to leaving out the details that the reader *doesn't need* -- e.g., writing a summary
- 7. IT professionals tend to be genuinely interested in the most detailed aspects of their work, easily forgetting that the business reader is **not**, and does not need to know about these details
- 8. IT professionals often don't realize that the business user only wants to know *WHAT happens*, not *HOW* the technology makes it happen

WHEN YOUR AUDIENCE IS *NOT* I. T. PROFESSIONALS . . .

- 9. There's an understandable fear that the one detail you leave out will be what the reader wants/needs to know about

- 10. ... or, if you're writing to a technical reader, that he/she will assume that you're simply not aware of any details you leave out ... and think less of you

- 11. The material's being complex makes it harder to know just how to present it (e.g., sequence/flow of information, subordination of topics to one another)

- 12. Since the material is highly factual, it's hard to structure any memo, report, etc., in any pattern other than simply fact after fact after fact....

- 13. Perhaps most of all: Information overload -- there simply is ***so much information*** about almost anything you write about ... and it's all so detailed, and it's all so important ... at least to you!

- 14. _____

- 15. _____

USE THE APPROPRIATE LANGUAGE LEVEL

Based on your analysis of who the audience(s) is (are), you must determine the reader's language level. Some aspects of the writing that will vary:

- ▶ How much background material/context for is needed - and where to place it
- ▶ How many examples, illustrations, and notes are appropriate
- ▶ How complex these can be
- ▶ What specialized technical terms/acronyms you can use
- ▶ How extensive your explanations will have to be
- ▶ How long your sentences and paragraphs can be
- ▶ How much visual material (charts, graphs, etc.) to include
- ▶ How much "backup" data or evidence is needed

WHAT DO MANAGERS/EXECUTIVES WANT TO KNOW?

This is a real list of questions that senior managers wrote on their employees' memos and reports in a division of GE. It indicates the types of information they wished had been included in these documents.

Problems?

What is it?

Why undertaken?

Magnitude and importance?

What is being done? By whom? Why?

Approaches used?

Thorough and complete?

Suggested solution? Best? Consider others?

What's next?

Who does it?

Time factors?

New Projects and/or Products?

Potential?

Risks?

Scope of application?

Commercial implications?

Competition?

Importance to company?

More work to be done? Any problems?

Required personnel, facilities, equipment?

**Importance relative to other
projects/products?**

Life of project or product line?

Effect on firm's technical position?

Priorities required?

Proposed schedule?

Business value added?

Shelf life of solution?

What investigated? By whom? When?

Why? How?

What did it show?

Better ways? Why?

Conclusions? Recommendation?

Implications for firm?

Materials and Processes?

Properties, characteristics, capabilities?

Limitations?

Use requirements and environment?

Areas and scope of application?

Cost factors?

Availability and sources?

What else will do it?

Problems in using?

Significance of application to firm?

Field troubles/Special design problems?

Specific equipment involved?

What trouble developed? Any trouble history?

How much involved?

Responsibility? Others? Ours?

Impact on other organizations? Their reaction?

What is needed?

Special requirements and environment?

Who does it? Time factors?

Most practical solution? Recommended action?

Customer service implications?

What would happen if we did nothing?

WRITING FOR "MULTIPLE AUDIENCES"

- ▶ Common problem for IT professionals -- writing for:
 - technical *AND* business recipients of same document
 - occasional *AND* frequent users of same software
 - fellow team members *AND* for your management
 - two or more levels of management who need "the same information" [of course, it's not really "the same"!]
- ▶ People often say it's impossible to please both audiences
- ▶ Critical step to your success is **planning**
- ▶ Do an audience/information needs analysis **for each one separately**
- ▶ Create a strategy that meets both sets of needs
- ▶ Some strategies that have been successful:
 - Common beginning -->> branching
 - Same basic document, but different attachments
 - Interweaving different levels of detail within a single document
 - Two separate documents, but derived from one another
 - Two different formats or media -- e.g., memo for one audience vs. in-person briefing for another audience
 - Different instructional approaches -- e.g., help screens vs. on-line tutorial

1. The purpose of this memo is to formally update [verb] you [to whom?] on the status of implementing our new imaging software. [what?]

2. This is to recommend [verb] to the department [to whom?] that we add an additional clearing clerk to our unit, [what?] and to outline [verb] the reasons [what?] for this recommendation.

3. I'm writing to request [verb] your [to whom] cooperation in helping the new settlement procedure run more smoothly. [what?]

SELECTING THE ESSENTIAL INFORMATION

1. Critical issues:
 - What do you need to tell the reader in order to achieve *your* result?
 - What is the **least** you need to say? What can safely be *left out* in order to be concise?
 - What level of detail does the reader need? Can these details go into an attachment? What kind? See below.

2. What does "essential" mean? The answer comes from:
 - ▶ Your own audience analysis: for whom are you writing?
 - ▶ An understanding of your relationship with the reader(s)
 - ▶ Your purpose statement: why are you writing?

3. What is the basis of your "selecting" certain information?
 - ▶ _____
 - ▶ _____
 - ▶ _____

THE "4 P'S" THAT HAMPER THE WRITING PROCESS

Do you hate writing – or at least find it less than enjoyable? The following analysis will reveal to you the sources of your feelings **AND** also provide solutions that have worked for thousands of other professionals.

- ▶ **Perfectionism**
- ▶ **Procrastination**
- ▶ **Protectionism**
- ▶ **"Parkinson's Law"**

PERFECTIONISM

How *perfectionistic* are you about getting writing done?

- ▶ must you have "the perfect time" to start or edit your writing?
- ▶ do you waste time being perfectionistic about your writing?
- ▶ are you perfectionistic about each word or phrase?
- ▶ on a difficult/complex writing task, do you "over-edit" yourself instead of showing the draft to a colleague for advice?
- ▶ what **is** the difference between perfectionism and a conscientious concern to get the details right?
- ▶ what **is** the difference between the need to rewrite for clarity and simply writing too many drafts?

PROCRASTINATION

Most people *procrastinate* about getting their important writing tasks done:

- ▶ do you wind up writing at the last minute -- and in effect send out a draft that could have been a lot better had you started earlier?
- ▶ do you have multiple "false starts" that seem to lead nowhere?
- ▶ do you miss (or almost miss) deadlines -- and thereby risk alienating recipients and your own management?
- ▶ have you ever looked into your "motives" for procrastinating?
- ▶ do you put off writing as long as possible because you "hate to write"?
- ▶ do you operate in "crisis management" mode when it comes to writing? what price do you pay for this?

PROTECTIONISM

Do you have issues with showing drafts to a colleague or manager to **protect** yourself from dealing with criticism?

- ▶ be honest -- are you simply fearful of getting feedback on your writing because....?
- ▶ do you perceive all feedback as criticism?
- ▶ where do these fears come from?
- ▶ what are you losing out on by not getting appropriate input?
- ▶ how does this "P" tie in with the other two "P's"?

"PARKINSON'S LAW"

"Parkinson's Law" states that:

"Work expands to fill the time available for it."

How to overcome Parkinson's Law:

- ▶ set **interim deadlines or milestones**
- ▶ make "task estimates" and measure your progress against them
- ▶ be realistic about how long an entire document should **realistically** take to draft
- ▶ use your outline as a time guide.