

# **Information Development Managing Your Documentation Projects, Portfolio, and People**

**JoAnn T. Hackos, PhD**



Wiley Publishing, Inc.



# **Information Development**



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Information Development: Managing Your Documentation Projects, Portfolio, and People

Published by  
**Wiley Publishing, Inc.**  
10475 Crosspoint Boulevard  
Indianapolis, IN 46256  
[www.wiley.com](http://www.wiley.com)

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Published by Wiley Publishing, Inc., Indianapolis, Indiana  
Published simultaneously in Canada

ISBN-13: 978-0-471-77711-3  
ISBN-10: 0-471-77711-0

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

1MA/SY/RR/QW/IN

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#### **Library of Congress Cataloging-in-Publication Data**

Hackos, JoAnn T.

Information Development : Managing Your Documentation Projects, Portfolio, and People / JoAnn T. Hackos.  
p. cm.

Includes bibliographical references and index.

ISBN-13: 978-0-471-77711-3 (paper/website)

ISBN-10: 0-471-77711-0 (paper/website)

1. Information resources management. 2. Information technology—Management. I. Title.

T58.64.H32 2006

658.4'038—dc22

2006030049

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Recent clients include The International Monetary Fund, The Board of Governors of the Federal Reserve, Siemens Medical, Hewlett-Packard, The American Red Cross, Network Appliance, Varian Oncology Systems, Kone Elevators and Escalators, Dell Computer, Cadence Design Systems, SAP, Avaya, Lucent Technologies, Nokia, Motorola, Nortel, Federal Express, Compaq Computer, and more.



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# Preface

In 1994, with the release of *Managing Your Documentation Projects*,<sup>1</sup> I put together many of the concepts and processes about managing technical documentation development that had been percolating in the field. The book has been well received, indicating that people involved in developing documentation needed a codified approach to the process. Many people tell me that *Managing Your Documentation Projects* continues to be their industry bible, providing them with a step-by-step process from planning and design through development and production. Most of the processes described in that book have changed little because they represent the basics of sound project management techniques. Except for some of the information associated with print product, little about the basics of documentation plans, project estimates and schedules, project tracking, and project completion has changed.

Nonetheless, much has changed for information development. As information-development managers, you are under considerable pressure to reduce costs and project time, to do the same or more work with fewer resources, send more projects to lower cost economies, and, in general, to increase the value of the information you deliver. I have designed this book to help you do so, in part by aiding you to make strategic decisions about information development, moving yourself squarely into the ranks of a professional mid-management leader. I have directed the discussion of project management toward smarter decision making there as well.

I hope that you find that by pursuing innovation in the design of projects, information, people, and organizations that your work is recognized as valuable to your organization as a whole.

---

## Innovation in project management

This book brings the documentation project management ideas up to date. Although planning, estimating, tracking, and managing projects remains fundamentally the same, the new information on project management in Part III of this book looks beyond the structured project of the 1980s and 1990s to the rapidly changing projects of the 2000s. Managers and information developers find themselves challenged by shorted schedules and the adoption of agile product development techniques that rapidly iterate design ideas until the customer identifies what is needed. Consequently, this book introduces agile information development to the mix without forsaking the central focus of planning information design and development around the needs of information users.

<sup>1</sup> JoAnn T. Hackos, *Managing Your Documentation Projects*, Hoboken, NJ: John Wiley & Sons, 1994. *Managing Your Documentation Projects* remains in print and available. This new book expands upon the originally ideas presented there but does not supersede them.

The project management best practices in Part III include new attention to topic-based design as a significant new design principle, replacing the development of monolithic documents that owed more to the conventions of printing than to an understanding of user needs. Topic-based design assumes that users are looking for standalone, brief, and specific information to help them complete tasks and use products and systems quickly and efficiently.

Managing topic-based development introduces complexities in estimating, scheduling, and tracking that were not part of book-oriented development. Topics must be carefully planned, estimated in terms of scope and complexity, assigned to information developers with subject-matter expertise, and tracked carefully through myriad changes through the life of the project. The business advantage they provide far outweighs any complications of project management. Topics give you specific, standalone solutions to deliver to customers, allow you to reconfigure content to suit the demands of customers and product configuration, help you increase your ability to update as soon as needed, and assist you in decreasing the cost of producing and maintaining content in multiple languages.

Thus the best practices for project management in Part III have been rewritten to foster a topic-based approach and promote efficiency in content management and delivering content in multiple deliverables through single sourcing.

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## Innovation in information development

The innovations in project management are, however, only a small part of the changes that 21<sup>st</sup> century information-development managers face. Since the 1994 publication, documentation management has been transformed into information management. The term “documentation” has within it an underlying assumption that has had a negative connotation in the industry. Documentation refers to information that describes product or process and how it was developed. Product requirements and specifications, engineering drawings, manufacturing instructions, and others all explain the intricacies of a product’s genesis and construction. In the same way, documentation is used to explain complete processes internal to organizations, including contractual agreements and statements of policy. Many times, such documentation includes procedures that codify the policies.

Documentation is by its connotations inward looking—tasked with explaining what is. It serves the needs of those that originated the policy, the process, and the procedures, including those processes defined during the development of hardware and software products.

Unfortunately, process and product documentation is not defined as meeting the needs of people who must use the processes or products to perform functions. People who need information to learn and be productive at work and at home are not well served by content that is focused on how a product was developed or how it is intended to work. Nor are they served by formal legal agreements or statements of contract or policy in learning to perform a procedure efficiently and effectively.

People need, of course, information that is developed with their learning and performance as a central goal, not an accident. And, more often than ever, people need information that is packaged and delivered in media that is most easily accessible. Before the 1990s, few options existed to deliver information in anything but print. Most technical and procedural information was packaged as books. Now, multiple media delivery of information, including websites, embedded and online help systems, knowledge bases, CDs, and others, is the norm.

As a result, many organizations dedicated to supporting people who need to learn and perform tasks with products or without have redefined their work. What was once documentation is now regarded as any type of information that guides users. What was documentation writing is now referred to as information development. Many technical writers today are referred to as information developers.

In the nearly 20 years since I wrote *Managing Your Documentation Projects*, information development has sought to focus on developing effective information for users rather than documenting how products were designed and developed. Although this transformation is by no means complete, information developers and managers are increasingly aware that describing product features and functions or writing legally correct policies and procedures does not promote good performance. If they want to ensure that customers and employees are productive, they must directly address their information needs and develop solutions that are more innovative and effective than shipping out an 800-page binder of incomprehensible detail.

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## Innovation in technology

Innovations in how to design information are influenced by better understanding of how information is used by its consumers. Innovations in how to manage projects are influenced by those design changes. Not only do the innovations increase customer satisfaction, but they encourage managers and information architects to invest in new technologies. At present, those new technologies include moving to topic-based authoring supported by XML tools and content management systems. The new technologies allow information developers to increase quality while decreasing the cost of development. Technologies that reduce time spent on formatting text encourage information developers to spend more time on planning, design, and development of sound content. Technologies that reduce production time for multiple media (print, PDF, HTML, help, and so on) increase the time devoted to ensuring that information is accurate and complete.

Technology innovations extend the information development life cycle into localization and translation. Content management systems allow you to deliver topics to translation as soon as they are ready, rather than waiting until entire books are complete. Translation memory tools preserve the asset of previous translations, and machine translations allow critical content to be delivered in a timelier manner.

Technology helps managers, and staff, reduce the number of resources required to produce a unit of content. Information planning and design encourages you to reduce the content to only what is needed by the user. Technology innovations further allow you to update content and respond to changing user needs more quickly.

## Innovation in staffing

Information-development managers are generally enthusiastic about applying new technologies to information development. They are increasingly supportive of design innovations that reduce the volume of unnecessary content that must be managed. Both minimalism and user-centered design encourage new approaches to managing content rather than simply documenting the product.

However, innovations in design and technologies are still not sufficient to decrease resource requirements to the levels demanded by senior management. Consequently, information-development managers seek additional ways to reduce costs without decreasing quality.

One solution is to move a percentage of information development to lower cost countries. When you can hire five information developers for the cost of one in the US or Western Europe, you can maintain staff size while reducing development costs. Even if the cost of offshore development is not as low as you may be encouraged to believe, the overall effect on total cost can be significant, as long as the lower cost staff remain inexpensive and the cost of training and managing them does not exceed their employment costs.

However, offshore development does nothing to encourage innovation. In fact, it allows you to continue to be inefficient and to produce content that no one needs.

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## Innovation in portfolio management

If your responsibility is to increase productivity, decrease development costs, and maintain value for the customer in the information you deliver, innovation in managing your portfolio of projects and responsibilities becomes essential. Many times, information-development managers see themselves in one of two ways: they are either people managers, keeping everyone motivated and skilled, or they are super project managers, either managing all the projects themselves or overseeing the project managers. Certainly, people and project management is an important part of the information-development manager's job. However, both are tactical responsibilities and can easily result in spending considerable time and effort going in the wrong direction and doing the wrong thing, albeit doing it well.

Such a manager quickly becomes an order-taker from others, including product and development managers or business-line managers. You are told, "Here is your set of projects for the next quarter or next year. Figure out what resources you need to meet the deadlines. And, by the way, do the work with half the resources you calculate."

Of course, you can employ technology to make your people resources more productive or find less expensive people and let them continue developing in the same old way. Or, you can choose a strategic direction for your organization, deciding which projects are most important for the organization and applying your resources there.

By aligning your strategy with overall corporate objectives, you can apply your best resources to the most critical projects, provide average support for less important projects, and relegate the end-of-life or the going-nowhere projects to maintenance or less. Actively managing your project portfolio is never easy. You will no doubt experience a great deal

of opposition from product and process managers who believe each of their projects is most important. But, by reducing resources, senior management is conveying the message that you must keep spending under control while supporting the corporate strategy. Like every other line manager responsible for manufacturing a product, in this case an information product, you must make difficult choices about what gets full attention and what is relegated to the back.

Part II of this book helps you understand the tradeoffs required for innovative management of your project portfolio, including an examination of technologies and staff growth and development. You will find the chapters of Part II organized to correspond to the four quadrants of the Balanced Scorecard, a management measurement scheme described in Chapter 3.

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## Reading this book

Part I of this book introduces the concepts I describe in this Preface. However, I begin in Chapter 2 with an update of the original 1994 Information Process Maturity Model (IPMM), an innovation that has become an industry standard. This 2006 IPMM gives you a method for comparing the state of your organization to others, from immature organizations indulging ad-hoc behaviors to well-organized departments led by innovative and professional managers. Use the IPMM descriptions of the five levels of process maturity and the eight existing and two new key characteristics to evaluate your present state. Consider what is needed to move to the next level.

Most of what you need to enhance the maturity of your organization is covered here. In Part II on portfolio management, I present many of the ideas I have been developing and sharing in the past 10 years on making strategic decisions about the direction of information development. In Part III on project management, I expand traditional project management to include techniques of agile project development coupled with innovations in information design.

I hope you enjoy the ride.



# Acknowledgments

Many people have contributed over the past 10 years to the development of the concepts in this book. Many of them are publications managers with whom I have worked on Information Process Maturity assessments, benchmark studies, customer studies, and content management projects. The members of The Center for Information-Development Management (CIDM) have been closely involved in reviewing the content and adding to my understanding of the challenges they face in managing enterprises that are increasingly global.

In particular, I want to thank those who have worked with me by reviewing chapters of the book as I struggled through them, helping me to clarify my thinking and adding examples from their own experience. Those contributors who read chapters and added their insights include Julie Bradbury, retired as director of information development at Cadence Design Systems; Diane Davis, senior director of information development at Synopsys; Sue King, information management consultant; Vesa Purho of Nokia Networks; Susan Harkus, information architect; Amy Witherow of Cadence Design Systems; Waldemar Frank of LUZ, Inc.; and Ben Jackson of Microsoft Corporation. I want to thank them most for their continuing encouragement of my ideas.

Beth Thomerson of BMC Software; Ann Teasley of CheckFree; Monica Lake, formerly of Dell Corporation; John Russell of Oracle; and Charlotte Robidoux and Patrick Waychoff of Hewlett-Packard were kind enough to share examples of their work that have broadened considerably the examples of creative and effective management best practices throughout the book.

The most significant contributor to this book is Bill Hackos, my husband and business partner. He and I have developed the concepts and techniques together. Bill is chiefly responsible for the project estimating and tracking processes and the metrics analysis. He brings his 30 years' experience managing projects and teaching our project management workshops. We talked over every chapter as I was writing, usually providing new insights that have strengthened the discussions. He has also been patient through yet another year of writing.

# Part

# 1

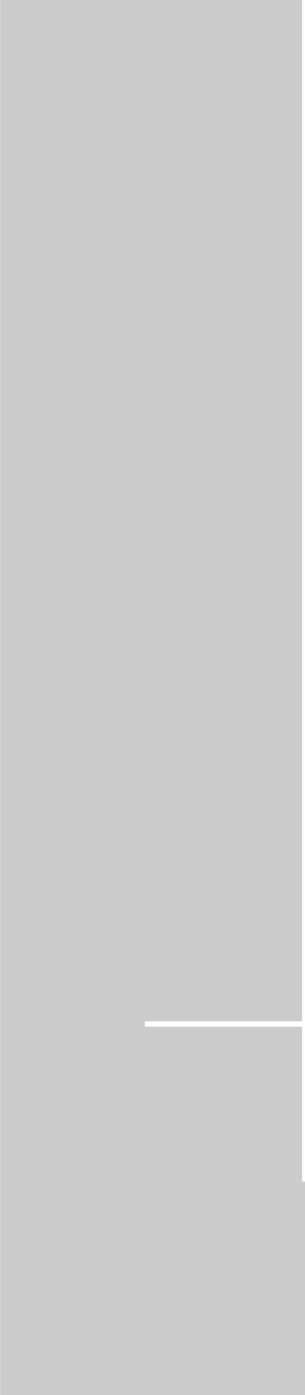
## **The Framework**

### **Chapter 1**

Introduction to Information-Development  
Management

### **Chapter 2**

The Information Process Maturity Model





"I thought management was going to be easy."