# Communicator

The Institute of Scientific and Technical Communicators

Winter 2022

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# How to invest in quality

**Rachel Potts** and **Michał Bochenek** describe how 3di make sure their style guide, and their approach to service design, make it easier to deliver great content.

This year, 3di received two TCUK Merit awards: one for helping Apptio deliver a new online help centre, and the second for a piece of documentation that rarely gets recognised, an internal style guide. We'd like to provide you with a bit of an insight into how we created both, and why we're so proud of them, starting with Michal Bochenek and our internal style guide...



## Internal style guide challenges

3di needs a modern, up-to-date style guide that not only reflects the current best practices in the world of technical communication, but also addresses the needs of our team of 30+ authors who work on diverse projects from a wide range of industries.

Our former style guide contained lots of valuable information, but wasn't consistently presented, and some sections were difficult to follow.

## Team and constraints

For this internal project, I was the Product Owner and the Author in one, and my responsibilities were the following:
- Planning and structuring the content
- Designing the content
- Creating the content
- Applying visual solutions created by the Tech Lead

Apart from me, we utilised the skills and expertise of other specialists within 3di, with each contributing the following:
- 10+ Technical Authors and Senior Technical Authors: peer-reviewing the content
- One UX Consultant: designing and reviewing new visual solutions
- One Tech Lead: implementing new visual solutions and revising the existing template

As the project was internal, the team could only work on the style guide when there were no urgent tasks for billable projects. Although we made sure the contributors could capture their time in our Jira system, we were often only able to get thin slices of time with each specialist.

## Technology

Our technology stack consisted of the following assets:
- MadCap Flare, a content creation, management, and publishing application
- XML, a markup language
- CSS, a stylesheet language
- Adobe Acrobat, a PDF editor
- Adobe Illustrator, a vector graphics editor
- Jira, an Atlassian issue reporting and task management software
- Confluence, an Atlassian wiki
- Git, an open-source distributed version control system
- Continuous integration and delivery (CI/CD) in GitLab
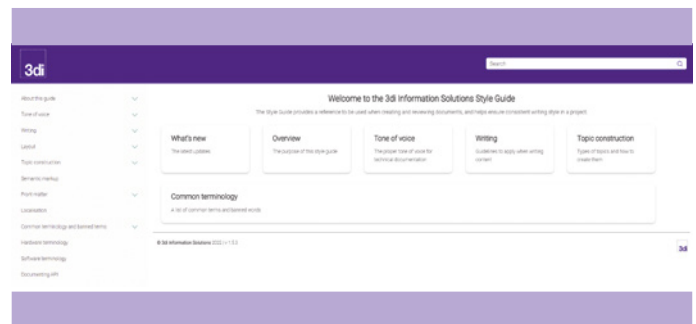


## Design guidelines

Our focus was on improving user experience. We needed to create a new content structure that was logically divided and easy to follow. This meant not only revising our existing content to make it aligned with the new Style Guide, but also implementing the review feedback collected over the years.



## Content and output

New content for the Style Guide needed to address all the areas required by the whole group of 30+ 3di authors. We focused on the following major pillars:
- Tone of voice and intended audience
- Content creation rules, including specific guidelines for grammar, syntax, punctuation, and many more
- Documentation layout, including specific guidelines for using visual assets
- Types of topics
- Semantic markup and document front matter
- Best practices for localisation-friendly content
- Common terminology and banned terms
- Terminology specific for hardware and software documentation
- Guidelines for API documentation

What we produced, is an easy-to-use online portal and its shareable PDF version.

## Impact

The main benefits of implementing the revised Style Guide are the following output improvements:

- An up-to-date resource that contains all 3di's style-related information, ready for any 3di author to use on any project
- Easy-to-follow articles
- Simple and clear update process
- Innovative visual solutions ready to be applied on billable projects
- More efficient delivery of customer projects
- Consistent training for new colleagues
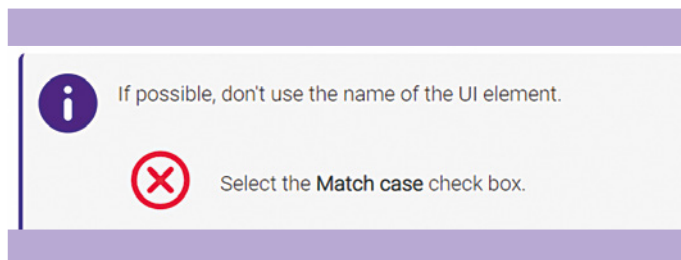


The new Style Guide improved the quality of work delivered by 3di authors and helped maintain stylistic consistency throughout all 3di projects. It has helped our authors deliver a range of projects, from paper technical manuals, all the way to online help portals.

*"An excellent example of a style guide. It went beyond what I would have expected. Having a style guide like this reinforces why you need a style guide especially when you have a lot of technical writers working on various projects. Where a good style guide has been created and maintained, the quality and consistency of documentation can be assured. This style guide is comprehensive, consistent (with explanation and good examples of usage). It also allows for (and expects) updates. This entry is very impressive and the style guide is one I would love to use."*

*UKTC Judges comments*



## Apptio's challenge

Apptio develop SaaS solutions designed to help organisations analyse, plan, and optimise their IT operating model.

In July 2020, they decided to outsource their technical writing to 3di. Our brief was to modernise and improve their user information, and deliver it in a new online Help Centre.

With about 10-20 new releases a month, Apptio needed a technical writing service that could keep pace with product and feature updates. But existing documentation was often out of date, and not aligned to Apptio's branding or user experience

aspirations. On top of this, there needed to be a complete migration of content to MadCap Flare, and the creation of a new Help Center portal. This was given added urgency by the imminent ending of Apptio's legacy tool licenses.

It was clear we were going to need to do major work on multiple fronts, simultaneously.

## The team

The 3di team combined expertise from about 16 people over an 18-month period:

- One Lead Consultant – Information and strategy design
- One Technical Consultant - Madcap Flare, and workflow design
- One Service Manager – Budget, delivery and service quality management
- Two Lead Technical Writers – Task management, Apptio SME engagement, and peer review
- Eight Technical Writers, two Madcap Flare technical specialists and one Git specialist

## 3di's solution

### *Short-term plan*

We quickly agreed on a short-term plan:

- Migrate content in its current state, to meet the tools licenses deadline
- Provide minimum support for product releases: release notes only

This gave us breathing space to spend time understanding the Apptio business, and designing the longer-term content strategy, processes and information design to align to business goals.

### *Multi-stream roadmap*

We developed a multi-stream roadmap that balanced support for product developments alongside defining and implementing the details of a new content strategy. Separate workstreams covered areas such as core technical writing, documentation debt, localisation, Help Center look-and-feel, in-app help and tools, and language, style and terminology.

For each workstream, the roadmap laid out goals per quarter, and the 3di team were organised so the right expertise was available to support the workstreams.

The roadmap helped us:

- Break a highly complex service down into manageable pieces
- Track progress and identify stalled workstreams
- Communicate with stakeholders in a structured way, both about progress on different workstreams and about relative priorities
- Ring-fence time for workstreams that might otherwise slip to the bottom of the to-do list
- Structure our project planning and day-to-day task management (in Jira)

### *Content strategy*

Following our information design process, we:

- Identified and prioritised the user information-needs (in this context, an "information-need" is something like "understand what can be customised in the UI" or "follow steps to migrate data from a 3rd party system")

- Designed a repeatable structure to meet these needs, that could be applied to all products to give predictability and improve user experience
- Identified a priority set of content – the MVP (Minimum Viable Product) – based on the highest priority information-needs

| Workstream | Implementation strategy |
|---|---|
| Core technical writing service | For developments to existing products, add MVP content in time for launch (new topics follow the new structure; minor updates follow the structure in the legacy content) For new products, create MVP set of content |
| Documentation debt | Respond to requests to correct errors or add detail Apply new structure to one existing product per quarter |

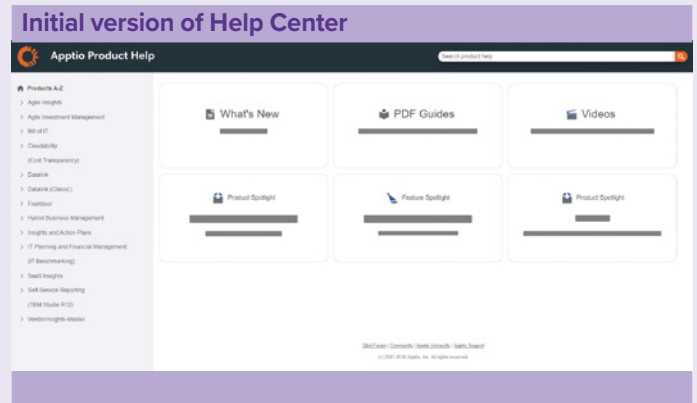### Apptio Information design overview



The information design gave us a target set of content to aim for with every product. But with a large set of legacy content, and new products being developed, there wasn't time to apply the new approach retrospectively to all the content. So we split work out into core and documentation debt activities.

### Help Center improvements

The deadline for migrating to the new tools meant the first version of Help Center went live with the look and feel set up as a proof of concept by the previous technical writing team. Going forward, our team needed to:

- Change the branding due to customer branding evolution
- Improve product names and structure due to evolving product strategy
- Meet the needs of the new content strategy
- Improve usability from the initial version inherited

With the site live and content being created and published almost daily, we implemented the new design through iterative changes, over six months.

The screenshots show some of the changes made during this time.

### Initial version of Help Center

**Basic rebrand**



**Full branding**



**Add Search filters**



**Simplify the navigation, add in-page navigation**
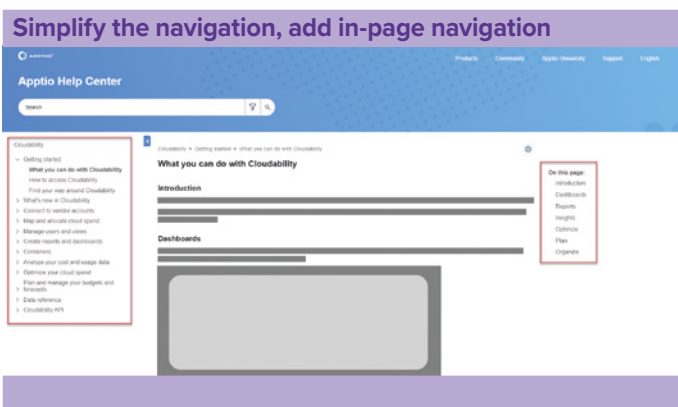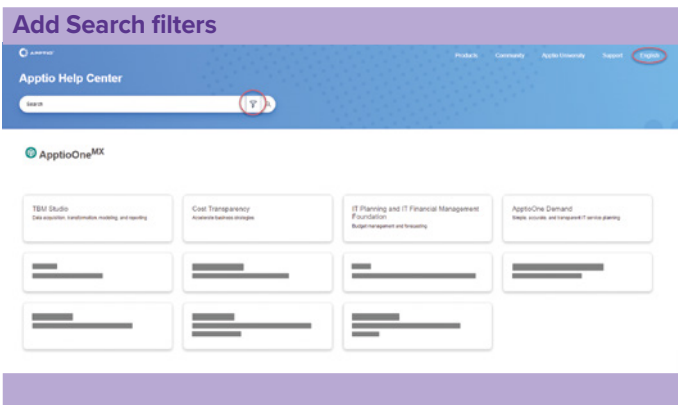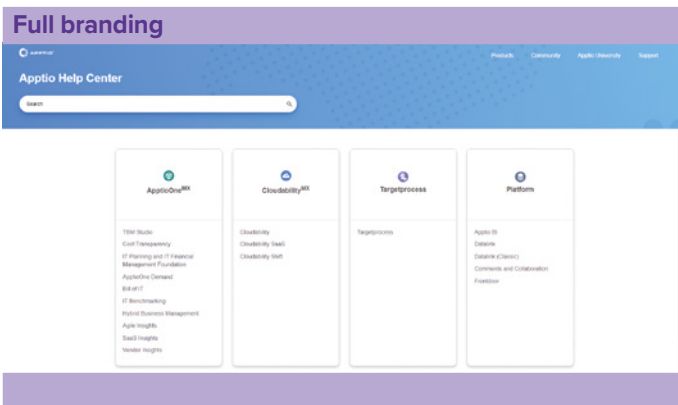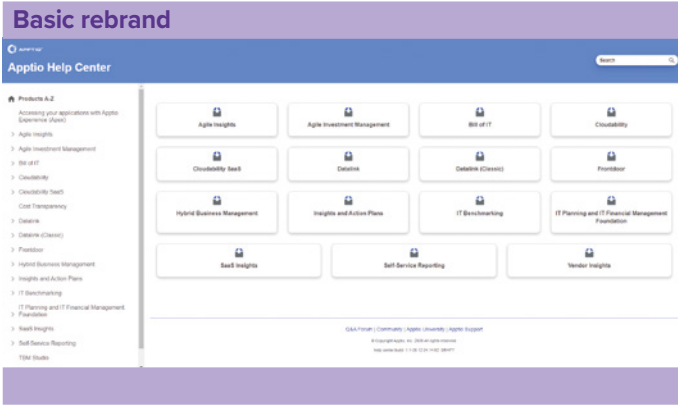


## Communication about design and progress

Although we worked with a small subset of stakeholders directly, the work we were doing impacted widely across the whole business. Keeping everyone on board with the changes, and engaged with our strategy was challenging.

Internal consumers of our Help Center content were an important audience for the information. For example, Support and Professional Services used the help information, and also pointed customers to it to encourage self-service.

Contributors to our Help Center content needed to understand and support our work. For example, Product Managers needed to provide information to Technical Writers following a workflow and timing designed to support product releases. Previously they'd been able to write and publish their own content.

On top of this, Apptio were hiring and replacing staff frequently – meaning that there were always new team members joining the organisation.

### Business-wide communications

We kept everyone informed by producing a series of quarterly internal communications, which we distributed via channels such as team newsletters, email updates to important groups of stakeholders, and Apptio's user assistance Confluence space. These updates needed to be brief and highly engaging, but also informative and useful.

### Impact on Apptio's business

3di's ability to bring in a range of different expertise meant we could design and implement changes on multiple fronts. During an 18-month period, we established a new content strategy, an improved user experience, and a systematic workflow to enable product help to stay in line with developments to the product. All whilst working in a live environment, and continuing to support frequent product releases.

*"A great entry from 3di. It was clear from the entry form that an awful lot of work went into this. Expectations were well managed in the project. I really liked how the process included keeping users updated with progress and what to expect, when. Everything about this was clear and very easy to follow. I would have expected nothing less from 3di. Very impressive entry; clear and logical; well thought out and implemented. Roadmap and detailed plans show how much care and consistent work was applied."*

*UKTC Judges comments* ◼

**Michal Bochenek**
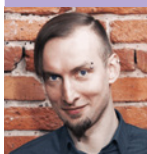
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