

# ROUGH DRAFT

The newsletter of the Phoenix STC Community

August 2006

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*Rough Draft* is the official newsletter of the Society for Technical Communication, Phoenix Chapter community. The newsletter provides news about chapter events, members, and publishes members' opinions about technical communication topics.

#### Newsletter Staff:

Karen L. Zorn, Managing Editor  
Clare Turner, Editor In Chief  
Gloria McConnell, Contributing Editor  
Linda Shacklock, Contributing Editor  
Kathy Graden, Contributing Editor  
Chanda Child, Jane Rossignol, and , Reviewers

#### Submitting Content

We invite readers to submit articles, columns, photos, and other material on subjects of interest to chapter and Society members. Deadlines for submissions is the 10th of the month prior to publication.

We accept articles submitted as e-mail, HTML, or files in Microsoft Word® or FrameMaker® format. We prefer GIF or JPEG graphics. Please include your e-mail address and your phone number. If you wish to send material by fax, first call the Managing Editor, Karen Zorn, at 408-354-0537.

The Rough Draft staff reserves the right to edit articles for clarity and length and to reject submissions judged unfit for publication. We try to review substantive editing of

## Dog Days of Summer

As I write this, the temperature is 114, humidity a sticky 30%, dew point 58, and clouds for the afternoon/evening monsoon storms are forming up in the high country.

So, sit back with a tall glass of something cold and enjoy this month's *Rough Draft*. It will refresh you!

[http://en.wikipedia.org/wiki/Dog\\_days\\_of\\_summer](http://en.wikipedia.org/wiki/Dog_days_of_summer)

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## 2006 PAO Liason Needed!

The Kachina Chapter (New Mexico) is sponsoring the 2006 Southwest Publications, Art, and Online competition. A PAO liaison is needed for the Phoenix chapter. Although at first glance the tasks may seem daunting, there are several chapter members who can guide you through the process.

The primary tasks of a Region 5 PAO Competitions Chapter Liaison include:

1. Recruit chapter members (and non-STC colleagues if needed) to serve as judges of entries received. (Kachina Chapter had 12 judges last year and each team of three had 4 or 5 entries to judge).
2. Receive a group of entries from the Regional Comps Manager (early October) that your chapter will judge and return them after judging is complete (mid-November).
3. Answer questions from local submitters.

4. Advertise this Competition locally. "Methods" would include:
  - a. Posting the "Call for Entries" on your chapter website, with a link to the main Competitions Webpage, (residing on the NM-Kachina website
  - b. Emails to your "listserv"
  - c. Announcements in your chapter newsletter
  - d. Announcements at your chapter events
  - e. News release to your local newspapers

Questions? Contact:

Bob Johnson  
R5 2006 Comp Mgr  
NM-Kachina Chap  
505-254-4142 (work hours)  
249-9292 (cell)  
[ziagrants@msn.com](mailto:ziagrants@msn.com)

# Meeting Information

Tuesday, August 8, 2006

## STC Phoenix August Networking!

feature articles with the author before publication. Our style guide is Words Into Type.

### Newsletter Mailing Address

U.S. Mail: Karen L. Zorn, Managing Editor,  
8515 E. Milagro Ave., Mesa, AZ 85209-7327

E-Mail: [rough\\_draft@zorntech.com](mailto:rough_draft@zorntech.com)

### Reprinting Articles

By submitting material, you implicitly license this newsletter to use it and other STC publications to reprint it without permission. If you reprint an article from Rough Draft, please credit this newsletter as the source and send the Managing Editor a copy of the reprint or the URL of the Web page where the article was re-published.

### Copyrights

Rough Draft design and layout are copyright STC, 2005-2006. Copyrights for all newsletter articles belong to the authors. When you submit an article, please notify the editor if it has been published elsewhere or you plan to submit it to other publications.

### Phoenix Chapter Mission Statement

As a world-class educational and informational forum, we discuss cutting-edge concepts and technology, encourage sharing information among members, and sponsor top-quality seminars and conferences.

We give our members the opportunity to grow professionally and be creative; to develop leadership, management, and other skills; to be recognized for their outstanding skills and service; to be the most sought-after employees in our field; and to attain international status as Society-level leaders.

We provide a fun and friendly, high-energy environment that fosters associations and friendships. We promote the value of technical communication and communication in general.

### Phoenix Community Contacts

**President:** Dana Osborne,  
[danaosborne@cox.net](mailto:danaosborne@cox.net)

**Vice President:** Karen L. Zorn,  
[k.zorn@zorntech.com](mailto:k.zorn@zorntech.com)

**Secretary:** Karen Pasley,  
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**Treasurer:** Karen Forrester,  
[klforres@cox.net](mailto:klforres@cox.net)

**Immediate Past President:** Lisa Ford,  
[lisafor-dtsgl@cox.net](mailto:lisafor-dtsgl@cox.net)

**Programs:** Maggie Haenel,  
[mhaenel@earthlink.com](mailto:mhaenel@earthlink.com)

STC Phoenix members live and work in all parts of the Valley and the State. As part of an effort to make events more accessible to members everywhere, we'll be holding both our summer networking meetings in new locations.

**What:** August Networking Meeting - Great company & great food combine to make great networking opportunities. Meet new friends and reconnect with old ones. Bring your thoughts and opinions on what the Phoenix Chapter can do to add more value to your membership.

**When:** Tuesday August 8<sup>th</sup>, 5:30 pm-

**Where:** Nello's Pizza  
2950 S. Alma School Road  
Mesa, AZ

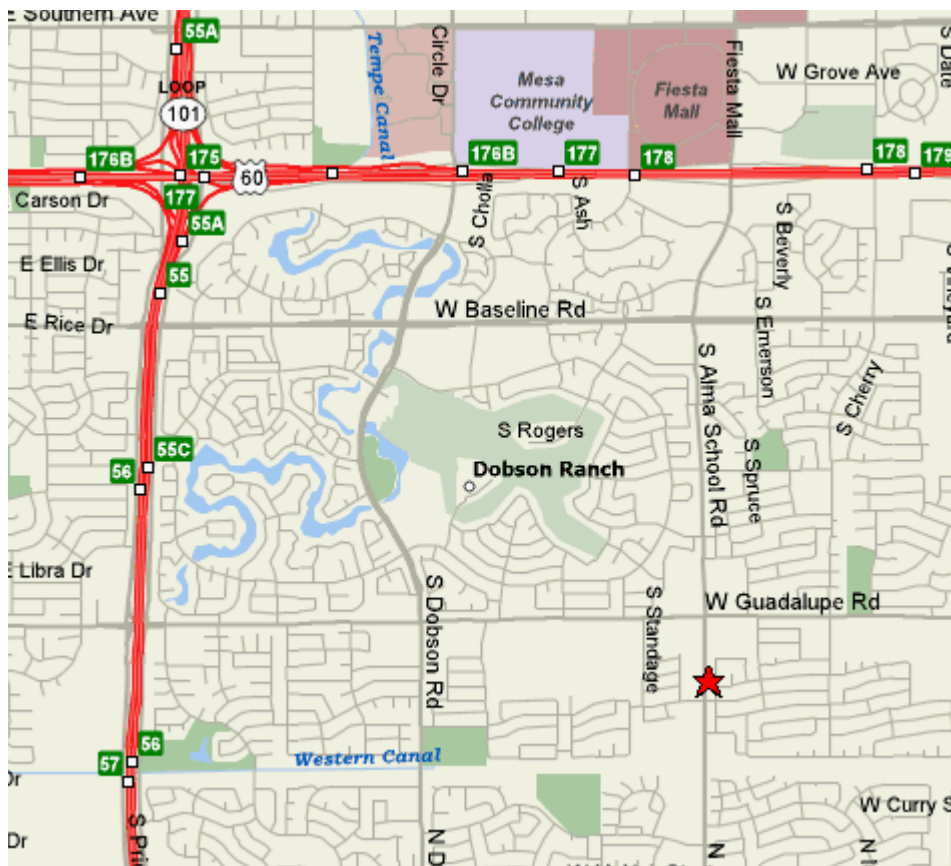
**Cost:** \$15 *cash only* at the door

This price includes pizza assortment, salad, soft drink or iced tea, tax & gratuity. Beer, wine, and other beverages available for purchase.

**PLEASE** bring **cash** to the event. Due to the nature of this event, we are unable to accept checks or PayPal payments.

**Register:** Please RSVP no later than noon Thursday, August 3. You can register online at [www.stc-phoenix.com](http://www.stc-phoenix.com), e-mail Norm Haskett at [stc-phoenix@yahoo.com](mailto:stc-phoenix@yahoo.com), or call Norm at 480-963-8102.

**Coming in September:** Program year start. Watch for information on this event coming to your inbox in August.



# Membership Matters

## Caught in the Middle, Part Deux

by Debra Duane, Membership Manager, STC Phoenix

As a follow-up to last month's article, I wanted to provide a copy of the map I spoke about, which shows the location of each Phoenix STC member based on address of record.

By plotting a circle around the general Phoenix-metro area, I was able to determine the center, which turned out to be within a few miles of our current meeting location (44th Street and the 202) in Phoenix.

As you can see, the membership is spread out across the entire Phoenix-metro area, with two distinct clusters: *Southeast* and *Northwest*. As your administrative council continues to meet and discusses potential meeting areas over the summer, we will strive to provide STC Phoenix members with centrally-located meeting sites within these two areas.

I welcome your comments and suggestions regarding this topic. Feel free to e-mail me at: [stcphx-member-ship@cox.net](mailto:stcphx-member-ship@cox.net)

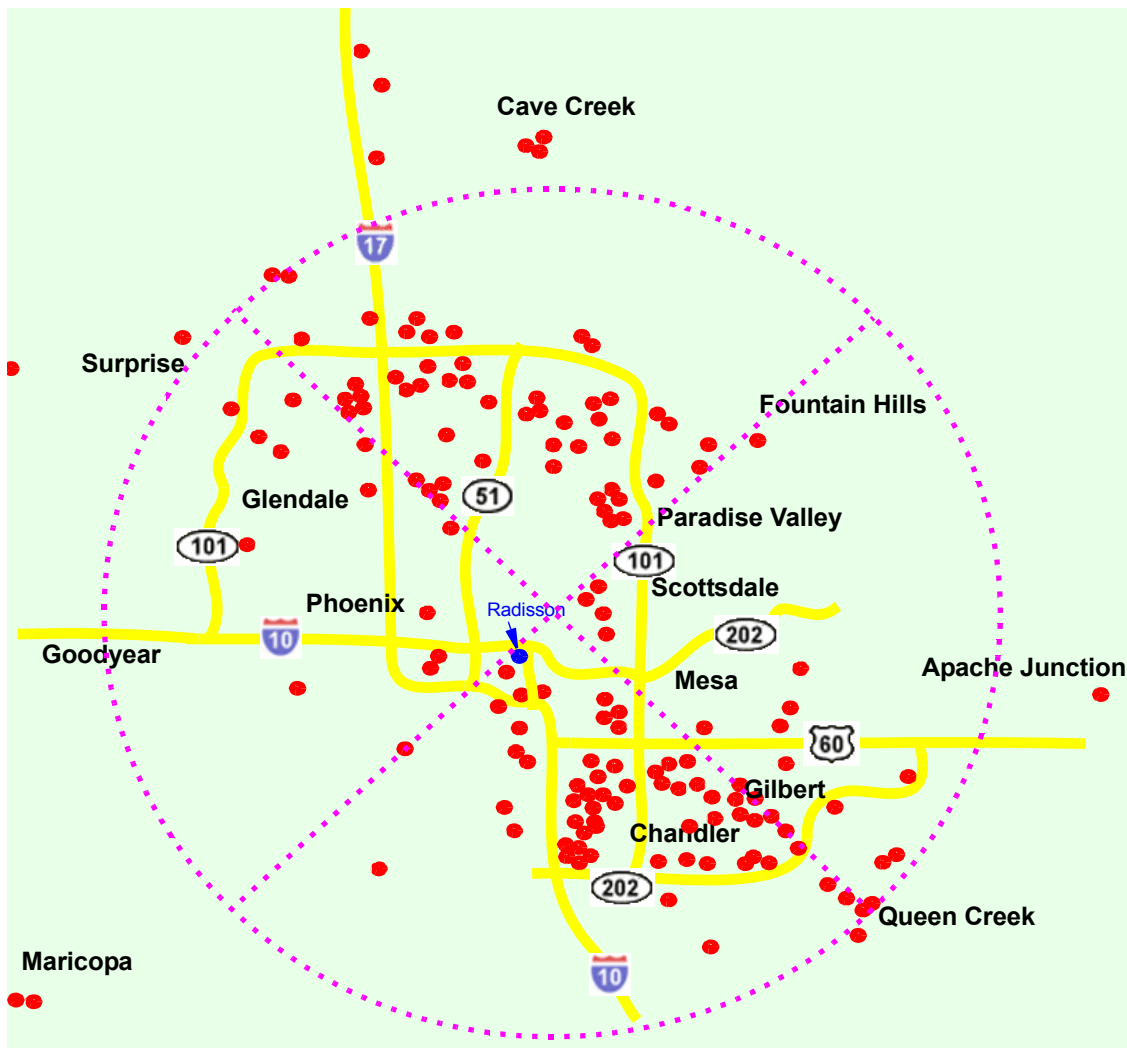
STC Phoenix Membership: 174

STC International Membership: 14465

New members: Kerri Flanagan, Lori Welckle, Terri Wood

Transferring member: Josh Wertheimer (from Orange County chapter)

Former STC members who have rejoined: Linda Jacobsen, Carol Layton, Joseph Ryan, Carole Smyser



# Tooling Around

## Wiki Update

by Gloria McConnell

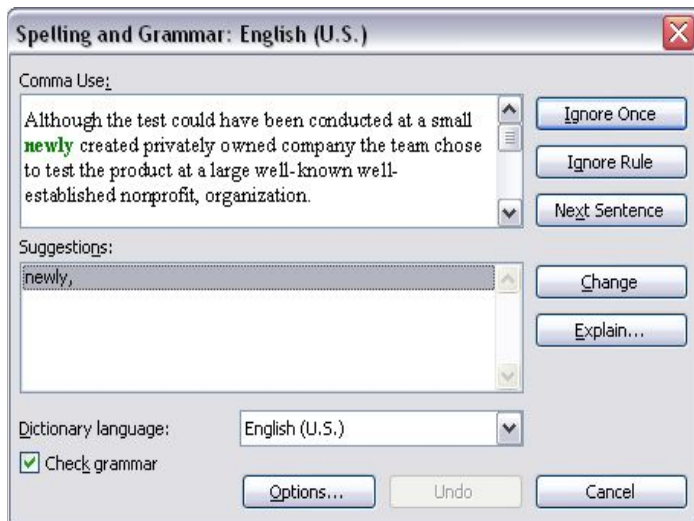
Regarding the recent column on wikis, I received a very gracious note from Bill Albing, a fellow tech. communicator who co-founded KeyContent.org. This wiki is dedicated to our profession, and includes a host of communication topics. An article on XML—"The Electric XML Acid Test"—is one that caught my attention.

Check out [KeyContent.org](http://KeyContent.org); feel free to contribute to the site. After all, that's what a wiki is all about!

### Grammar Checkers

In future columns, I will be evaluating grammar checkers and related tools. If you have experience with a particular tool or would like a particular tool evaluated, please let me know. Send an email to [gloria.mccconnell@honeywell.com](mailto:gloria.mccconnell@honeywell.com).

As a first taste, however, let's see how Microsoft Word's grammar checker is doing. This is Microsoft Word 2003 SP2 on Windows XP. Here is a sentence with several missing commas, a correctly placed comma, and an incorrectly placed comma:



Although the test could have been conducted at a small newly created privately owned company, the team chose

to test the product at a large well-known well-established nonprofit, organization.

In my test, Word initially identified "could have been" as passive voice (something most grammar checkers thoroughly eschew). That's it—Word had no issue with commas, missing or otherwise. Interestingly, when I removed the correctly placed comma (after the word "company,"), Word decided that passive voice was not the issue; a comma might be needed, as shown in the following figure. For now, I'll leave this behavior at "hmmmmmm."

### Word's Grammar Checker

In defense of Microsoft (perhaps), following is a recent comment from an MSDN (Microsoft Developer Network) blog hosted by Microsoft's Group Program Manager for Office Authoring Services, Chris Pratley. "Authoring Services" includes Word, Publisher, and OneNote.

**"re: Let's talk about Word**

"Wednesday, March 22, 2006 9:22 PM by Chad Schieken

"I'm curious, howmuch effort has been put into the grammar checker? I'm finding that it doesn't find alot of things that I wish it did find.

**"re: Let's Talk about Word**

"Tuesday, March 28, 2006 2:37 PM by Chris\_Pratley

"Chad, the grammar checker is under active development. Because natural language processing is such a difficult computer science problem it has much longer cycles than the products do. And it gets harder after you do the 'easy' stuff (actually not easy). In 2007, you'll see improvements in contextual analysis that flag incorrect word usage. For example, we can now detect errors like 'this is a loosing proposition.'"

Bye for now. Don't forget to drop me a line with your request or story about grammar checkers! Send an email to [gloria.mccconnell@honeywell.com](mailto:gloria.mccconnell@honeywell.com).

# Seminars, Education Opportunities, Workshops

## IDL SIG Webinar Request for Proposal

The Instructional Design and Learning SIG of the Society for Technical Communication is producing webinars of interest to the membership in October 2006 and March 2007. The SIG is seeking proposals for these programs. *Deadline for receipt of proposals is August 11, 2006.*

Areas of interest to our members include, but are not limited to:

- Ways to use learning theory to solve real-life training problems.
- Emerging tools and technologies and how to use them effectively in training.
- Practical examples of using elearning solutions in planning, designing, developing and delivering training to diverse audiences.
- Working with webinar and other elearning software and tools
- Effective evaluation practices.

## General Information

**Session length** - One hour with 15-minutes question and answer or group involvement. Conferencing software - Replay Rich with standard conferencing features including polling capability. A recorded version will also be made available afterwards for a reduced fee. Funding - Presenter will receive \$150 plus 25% of the net income.

**Fees** - Registration fees are \$50 for members and \$65 for non-members.

## Submission Requirements

Contact Information including:

Your name  
Preferred mailing address  
Telephone number(s)  
E-mail address  
Your background that qualifies you to present on this topic

Design Documentation including the following elements:

Presentation title  
Brief description  
Target audience (level of experience)  
Statement of learning objectives  
Content outline  
Relevance of topic to audience  
Learning activities and or discussion/polling questions

## Audition

Presenters are expected to give a five-minute sample presentation by telephone at a mutually agreed-upon time. Reviewers will evaluate the speaker's ability to communicate in this medium. This analysis is part of the acceptance criteria.

## Evaluation Criteria

Proposals will be evaluated on the following criteria:

### Topic and Treatment

- Topic provides useful information for an STC and IDL audience
- Treatment of topic is timely and of interest to STC and IDL audience
- Level of material is appropriate to STC and IDL audience
- Material fits webinar format

### Quality of Session Plan

- Plan contains well-developed and actionable objectives
- Plan contains a schedule of activities or polling questions or time-line
- Activities or polling questions are clearly written
- Session description is clear and well written
- Information about each presenter is included

### Sample Materials

Sample materials contribute to understanding of the proposal

Visuals are appropriate to webinar presentation

Resources are provided as appropriate

Quality of Proposal and Supplemental Materials

Material is well-organized and easy to understand

Material demonstrates professional standards for writing and editing

Material contains no grammatical or typographic errors  
Audition

Voice quality - easy to listen to; not too high pitched

Diction is clear; no dropped endings to words or slurring

Correct use of spoken English

Appropriate use of pausing, pace, pitch and power for emphasis

Friendly, casual, enthusiastic tone

## Submission Deadline: August 11, 2006.

Submission Selection Deadline and notification: September 6, 2006

RFP and proposal forms are available at: <http://www.stc-sig.org/idl/events.shtml>

Please send proposal to:

Proposal Review Committee  
c/o Jane Smith, [jemcomm@sedona.net](mailto:jemcomm@sedona.net)

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## Arizona International Society for Performance Improvement (AZISPI) Announces Thiagi Seminar

Register Now and SAVE!!! A 1-day workshop designed and conducted by Dr. Sivasailam "Thiagi" Thiagarajan, Interactive Strategies for Improving Performance. Details below. Registration form attached.

**What:** Interactive Strategies for Improving Performance, by Dr. Thiagi

**When and Where:** November 3, 2006 8:00 am to 5:00 pm

University of Phoenix  
Tempe Campus  
1150 West Grove Parkway  
Tempe, AZ 85283

**To Register:** Download the attached registration form and mail to AZISPI with check. [www.azispi.org](http://www.azispi.org)

**How To Save:** Send 3 or more people from one company and receive the member rate! Note on registration form total number attending from your company.

**What You Will Learn:** In this workshop, Thiagi reveals five secrets of effective interactive training that is faster, cheaper, and better.

- Structured sharing that helps practitioners exchange their expertise with each other.
- Interactive lectures that enable you to retain control of the session while participants interact with each other.

- Textra games that make your dull, dry handouts come alive.
- Simulation games that use inexpensive materials and methods to reflect the realities of the workplace.
- Jolts that last for a few minutes and provide powerful insights and concepts.

Then, based on 20 years of field experience and research, Thiagi will share three important secrets of effective training facilitation:

1. Identify seven critical dimensions of activities-based training.
2. Recognize participants from hell and their disruptive behavior patterns. Learn strategies for discouraging such patterns and specific tactics for handling each pattern.
3. Identify the importance of the debriefing process for linking the training game or activity to the workplace reality. Learn a powerful six-phase model for maximizing learning from experience.

Don't miss this opportunity! Register today and save!

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## Call for Proposals for the 2007 Technical Communication Summit

The "Call" you've been waiting for is here!

The Call for Proposals for the 2007 Technical Communication Summit -- STC's 54th Annual Conference -- is online at [www.stc.org/cfp](http://www.stc.org/cfp).

The conference has been redesigned with a new name, new format, new energy. Changes include:

- new Tracks (formerly Stems) for technical sessions
- new formats for presentations offering practical knowledge members can use, such as the case study
- "conference within a conference" -- a new idea for STC meetings

Be part of the change while moving your career forward!

Please read the Call for Proposals carefully.

Increase the likelihood of your proposal being accepted by presenting on one of the specific topics.

Phylise Banner Klein  
Manager, Conference Program Committee

## Submission deadline for proposals: September 1

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## Conference Program Proposal Reviewers Wanted!

The Society of Technical Communication (STC) 2007 Conference Program Committee is currently searching for Developing and Delivering Content Track reviewers.

Reviewers will be asked to review between eight and ten proposals. The proposals will arrive at the beginning of September and will be returned at the beginning of October. Each reviewer will be given a worksheet to help guide the review process.

For more information or to apply, contact Nicole Trick at [Nicole.Trick@eur.sas.com](mailto:Nicole.Trick@eur.sas.com). When applying, please provide:

- a short description of why you would like to be a reviewer
- your current résumé.

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## December 6, 2006

Maggie Haenel will present an STC Web-telephone seminar, "Creating Training that Sticks," from 1 to 2:30 PM Eastern Time. The seminar will focus on how adults learn and what makes them remember information. For more information or to register for the seminar, please visit [stc.webex.com](http://stc.webex.com)

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## Tech Writers Get Respect!

Maurice Martin, STC Communication Director

Technical writing is Money Magazine's "Lucky Number 13"

[Money Magazine](#) and [Salary.com](#) have just released a new list of the 50 "Best Jobs in America"—and technical writing landed at number 13! What's more, two other job titles used by STC members—curriculum developer and editor—scored numbers 18 and 19, respectively.

In evaluating the jobs, Money used such criteria as salary, growth, stress levels and flexibility in hours. You can view the complete list at:

<http://money.cnn.com/magazines/moneymag/bestjobs/top50/index.html>

The list is targeted at those considering a career change, but how does it help you, the practicing technical communicator? You can use the list to publicize what you do and the current industry recognition it's receiving! Consider bringing the list to the attention of your manager or supervisor. Other recipients might include your internal or external customer organizations, and perhaps your company newsletter and website as well.

At the very least, the list is a prestigious acknowledgment of the rising profile of technical communicators. So, spread the word! And, congratulations—you have one of the "Best Jobs in America"!

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**Grammar Central**  
Basics for Communicating Clearly  
by Linda Shacklock



**into**

Use the word *into* to indicate entering something.

Get into the car.

Go into the business of technical communication.

Use *into* to indicate changing the form of something.

When the ice turns into water, dump it out.

If the one-person project turns into a two-person project, we'll adjust the estimated hours.

Use *into* to indicate making contact with something.

If you run into a problem, ask for help.

Try not to drive into the garage wall.

**in to**

If you can drop the word *in* but keep the essential meaning, you need the two words *in to*.

When the butler appears, the guests will go in to dinner.

Tune in to channel 8 for the 6 o'clock news.

With thanks to Patricia T. O'Conner's book *Woe Is I: The Grammarphobe's Guide to Better English in Plain English*.

Collected "Grammar Central" topics: [Click here](#).

Questions or idea for a column? E-mail [Linda Shacklock](#).

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# On the Job

## Voice of the Project: a Special Niche for Technical Communicators

by Kathy Graden

Workload ebbs and flows on long-term technical communication projects. Some days, a tower of tasks overwhelms you, clamoring for your time and attention. On other days (like when a project is ramping up or during review cycles), you scrounge for work to keep busy.

Proactive technical writers turn slow times into networking opportunities by offering to tackle any situation that needs a skilled communicator. You can gain visibility and forge alliances with key people in your workplace by volunteering to:

- Edit or proofread managers' letters, proposals, and other business communications.
- Scribe at design or development meetings.
- Help others solve usage problems with tools such as Word, Excel, etc.

In times of light workload, you can also score points with your own technical publications team (and your team leader) by crafting improvements to work practices or developing style guides and time-saving templates. But there's a special role you can play by aligning yourself with project leads. You can become, literally, the "voice of the project," the spokesperson who directs and facilitates communication within the team, between the team and your organization's management, and between your organization and your customers or clients.

Let's look at a sample scenario that would offer a technical communicator the opportunity to be "voice of the project."

Suppose you're a technical writer for a project team working to develop and deliver a big end product for a customer, such as a brand-new database system or a software application that affects all departments of a corporation. Projects of this size usually split work among several sub-teams, each with its own manager. In addition, there's usually an overall project executive and a Project Management Office (PMO) that consists of one or more project managers. In this particular case, let's also assume that the project's customer expects and requires frequent information sharing and progress reporting from the team and its members.

On large projects like our example, the PMO drives and manages internal and external communications. These can be anything from status reports to charts and diagrams to setting up and maintaining an information repository everyone can access. All of these tasks require strong skills in information design, writing, and editing. The information shared must be clear, to the point, and presented attractively. That's where we technical communicators come in.

Here are some types of "voice of the project" communication tasks that capitalize on technical writers' expertise:

Deliverable	Audience	What a Technical Communicator Can Do
An online repository that allows users to store and exchange documents and other data such as software source code.  <b>Examples:</b> SharePoint and SourceForge are two widely-used tools for managing online information databases.	All project team members and managers. The customer's associates also may require or request access to the data.  Even if you don't have the technical knowledge to set up the repository, a technical writer can:	--Analyze the information to be stored and shared.  --Define an organization plan for information that's sensible and makes document retrieval easy.  --Establish naming conventions for files in the repository.

Deliverable	Audience	What a Technical Communicator Can Do
<p>Documents that discuss the tools team members use, best practices and lessons learned, and describe activities of the entire project or specific sub-teams.</p> <p><b>Examples:</b> Blogs or newsletters.</p> <p>You can also communicate best practices and lessons learned using a wiki or a formal methodology or users' guide.</p>	<p>All project team members and managers, and the customer's management or other project stakeholders.</p>	<p>--Identify topics the team wants to know more about or that share the knowledge of individual team members.</p> <p>--Select the appropriate format for delivering the information.</p> <p>--Create and publish the documents.</p>
<p>PowerPoint presentations</p> <p><b>Examples:</b> Materials for display at events such as executive briefings, general "town hall" meetings, or lectures. These may include "Project 101" presentations to orient new team members.</p>	<p>Any combination of senior managers, team members in general, and customers or other stakeholders.</p>	<p>Materials for presentations for events like those described in Column 1 usually come from multiple sources - project executives, team leaders, etc. Thus, the compiled presentation may have a "too many cooks" look. And because many technical people are more attuned to functionality than appearance, their input may be unattractive.</p> <p>The technical writer can bring order to the chaos, editing text for consistency, designing the flow of information, and adding images or cleaning up type to make slides more appealing.</p>
<p>Graphics</p> <p><b>Examples:</b> Progress charts; workflow, process, or critical path diagrams; graphic images for a user interface</p>	<p>Any combination of senior managers, team members in general, and customers or other stakeholders.</p>	<p>Thanks to clip art and tools such as SnagIt, Visio, PhotoShop, or Paint Shop Pro, a technical writer doesn't have to have artistic training to generate good-looking graphics.</p>
<p>Weekly or monthly status reports</p> <p><b>Examples:</b> A PowerPoint- or Excel-based display of the status of each sub-team and describe issues or risks and plans for addressing them.</p>	<p>Team leaders, senior management, and customer/stakeholders. This audience expects documents that are brief, yet provide visual interest through graphs and other images.</p>	<p>Here, technical writers provide the same types of expertise they can apply to PowerPoint presentations.</p>
<p>Tool usage aids</p> <p><b>Examples:</b> Quick reference guides or cheat sheets that provide tips for using common tools.</p>	<p>General team members.</p>	<p>--Identify the tasks for which users most often need help.</p> <p>--Interview expert tool users and do other research to glean useful procedures, workarounds, etc. that will assist users.</p> <p>--Develop and publish the reference documents.</p>

Deliverable	Audience	What a Technical Communicator Can Do
Articles describing innovations or successes that occur during the project.  <b>Examples:</b> White papers or case histories	Customers, project stakeholders, readers of internal company publications or trade journals.	--Identify article-worthy topics.  --Interview subject matter experts.  --Present the facts in a narrative that "sells" the topic.
Detailed records that capture decisions made or issues raised at key project planning meetings. Also spreadsheets that record action item assignments and progress toward resolving the items.	Team leaders, senior management, and customer/stakeholders. The PMO team uses these documents to build project requirements, reconfirm stakeholder expectations, and track issue and risk resolution.	Technical writers are good at distilling information. Unlike casual note-takers, they can synthesize what's being said at the meetings so that the document captures key points, in as detail as necessary to be understandable and without parroting every spoken word.

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## Snippets, Miscellany from listservs

I belong to several listservs, Techwr-l, FrameUsers, and several STC SIGs. Every so often, there's information that is of interest to our membership. If you find something on a listserv that would be of interest to our membership, please forward it to: [rough\\_draft@zornotech.com](mailto:rough_draft@zornotech.com).

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Given how commonly used this research tool is in our industry, I hope this won't be regarded as a commercial announcement. (I don't have any connection with them.) I just thought others on this list might be as happy as I am to learn that as of September, the Chicago Manual of Style is going to be available online for a subscription fee of \$25 introductory price, \$30 regular fee.

For more details, see <http://www.chicagomanualof-style.org/index.html>

I assume by now that nearly everyone has seen the scarily accurate "Business BS Generator" but just in case not, check it out at [http://www.erikandanna.com/Humor/bullshit\\_generator.htm](http://www.erikandanna.com/Humor/bullshit_generator.htm)

Janice Gelb, techwr-l

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Since we periodically get questions from techwhirlers asking for samples or templates, thought that this reference posted to the copyediting-l group (thanks to Francine Krawowska) might come in handy: <http://www.usersmanual-guide.com/>

Geoff Hart [ghart@videotron.ca](mailto:ghart@videotron.ca) (try [geoffhart@mac.com](mailto:geoffhart@mac.com) if you don't get a reply) [www.geoff-hart.com](http://www.geoff-hart.com).

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In light of this week's discussion on a certain word/pair of words and all similar discussions previous and in the future: "What's a Word Gotta Do to Get in This Joint, Anyway?" <http://www.powells.com/blog/?p=969>

Cassandra Greer  
Technical Translation and Documentation

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Rockley Report Opens Article Archives Up - Free Access For All

For technical writer and editors, there's a valuable resource called The Rockley Report -- previously a subscription-only publication -- now available for free. Written and edited by practitioners who work in the trenches, The Rockley Report features content management case studies, best practices, and lessons-learned designed to help technical communication professionals demystify some confusing concepts and avoid making the costly mistakes made by others.

"Now everyone can benefit from the insight of the many content professionals that have contributed their knowledge and experience to The Report," said Ann Rockley, founder and president of The Rockley Group, a Toronto-based content management consultancy. "Our guest authors, our customers, and our peers are all represented in The Report. It's a treasure trove of useful information."

Guest authors included in The Rockley Report database: Bob Boiko, Louis Rosenfeld, Judy Glick-Smith, Bill Albing, Tony Byrne, Lisa Woods, James Robertson, Erik M. Hartman, Sara Porter, Jim Byrne, Rahel Anne Bailie, Nina L. Junco, Philippe Robitaille, Charles Cantrell, Scott Abel, Cori Czekaj, Lori Kegel, Suzanne Escoffier, Suzanne Mesican, Ted Spencer, Debbie Donahue, Ben Martin, Hélène Keufgens, Peter Argondizzo, Tanya Stevenson, Diane Mueller-Klingspor, Steve Huffman, Janice Jones, Tim Wilkes, Kelly McCurry, Wendy Shepperd, and Ralph E. Robinson.

The Rockley Report: <http://www.rockley.com/TheRockleyReport/>

Check it out!

The Content Wrangler, Inc.  
Scott Abel, Content Management Strategist  
3421 Crystal Lakes Ct., Sarasota FL 34235  
[abelsp@netdirect.net](mailto:abelsp@netdirect.net) 941-359-3416  
[www.thecontentwrangler.com](http://www.thecontentwrangler.com)  
Via Skype: abelsp

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## Strategies for Critical Client Reviews

Compiled by Lesley Peters, Qualified Communication Services, Tampa, Florida

*listservs can generate interesting, thoughtful, and helpful discussions. On the Consulting and Independent Consulting SIG listserv, Lesley Peters asked the question, "How do you get your clients to cooperate in document reviews?" Following is her summation of the many answers she received.*

Hello all,

Many thanks for so many wonderful answers to my question about obtaining client reviews. I cannot say enough words of appreciation for everyone's input.

Here are the results:

Everyone agreed that client reviews are definitely one of the biggest challenges we have in documentation projects! Here are tips from the group:

1. Make your expectations about reviews very clear at the beginning of projects. Include your review and approval requirements in every proposal I write. Specify how many reviews clients can do within the fixed fee and what I expect during every review (e.g., make as many substantive revisions as possible on the first draft). Make clear in the proposals that meeting the delivery deadline is contingent on timely review and approval by the client.
2. Require clients to appoint a focal point for project approval (it's usually your main client contact), and make this person responsible for gathering and compiling comments from all reviewers to return to you. Part of this person's job is to "bug" reviewers who are behind schedule.
3. During the project kick-off meeting, discuss with your clients the importance of a timely review process. When we're talking about the schedule, tell clients that the greatest hurdle to meeting deadlines is getting their reviews done on time. You can say this with a friendly smile and in good humor.
4. Give clients a schedule that includes their review deadlines. Get in touch immediately if they fall behind. Most clients want their project done on time, so it usually helps to remind them that you won't be able to meet your deadline if they don't meet theirs.
5. Be persistent in a friendly and professional way. Most people are busy and actually appreciate reminders.
6. If you're working on a fixed fee, make most of your progress payments contingent on deadlines that you control. For example, on a fixed fee project with three payments, make the first one due on project approval, the second one due when you deliver the first draft, and the final payment due on delivery. If the client delays after submission of the first draft, most of the fee has already been billed.
7. You can include a clause in your contracts giving me the right to change the payment schedule if the client delays the project significantly beyond the agreed-upon schedule.
8. If your clients are open to the idea, consider scheduling a meeting for you to sit down with all reviewers at the same time. They can go through the document page by page and give you their changes live. They have an opportunity to work out any differences of opinion, and at the end of the meeting you've got everything you need to revise the document. This has only worked for me occasionally-clients don't usually want to take the time-but it's a very good technique when it's feasible.
9. you can arrange with the project owner at your client to have a "passive approval". Then, if you have not heard otherwise by the deadline, it counts as approved. To be fair though I remind the reviewers. A surprising number react. In other cases, there is no

way around an active approval. In this case (depending on the size of the project) insist on a partial payment at milestones that are not dependent on other people, with only the final payment after the very final approval.

10. Bid all projects for the hours you work on them, and use a 15- or 30-day billing cycle. If necessary, fall back on other clauses in your contract, such as "timely review" or "cancellation or delay in project." Either one of those clauses would justify your asking for full payment of all hours worked to date because in essence the client has violated the terms of the contract. Hopefully you can approach your client and engage in a reasonable discussion about the problems you're having, and he'll be willing to reimburse you for monies earned thus far.
11. Payment is not tied to milestone completion. I have so many projects that get delayed on a regular basis. Work on an hourly basis, and bill every other week, regardless of the status of the deliverable. This has its drawbacks.
12. Schedule a meeting or conference call to discuss the review at the time you send the draft. An appointment on the calendar, at which the reviewer will have to face you in person or speak to you on the phone, is a harder deadline to ignore than a "please return by" date. This also gives you an immediate opportunity to clarify reviewers' comments and to dig deeper when necessary. Of course this contact takes more time, and it isn't always possible, but it certainly seems to help, if you can do it.
13. Another tactic that sometimes helps is to include a review checklist as a tool to specify the kind of feedback you want and to highlight particular issues you need the client to address. (Something like a review checklist especially helps the extreme non-writers among your SMEs, who might have only a general idea of what they're supposed to be looking for, and even less ability to adequately express their comments in writing.) The risk here is reviewers might just answer the questions you've listed; they might not thoroughly read the whole document and alert you to inaccura-

cies you didn't flag as issues, but if you include your general review guidelines / expectations in the checklist, that shouldn't be a problem.

14. Payment is linked to completed milestones, Include relative dates for return of client review with wording to identify consequences of no review (re: payment anyway). If they don't meet the date, they are in breach of contract and you can get paid. Send cover letters with my review sheets identifying specifically what kind of review I want (accuracy, completeness) and specifically what I do not want reviewed (style), date doc was sent to reviewer, name of reviewer, and date of expected return. Find out what each reviewer can handle for a given review (full chapter, section) and limit what I send out to meet that need. When emailing docs for review, the subject line reads: TIME CRITICAL: PLEASE RETURN BY date. If needed, cc supervisors/managers. Find alternative reviewers. Escalate to managers when needed, identifying the consequences of documents going out without adequate reviews.
15. A contract agency bills monthly for hours worked, not milestones. If you must bill by milestones, bill for each draft YOU complete, not each one they review. That way you get paid when YOUR work is done, even if it takes the client an ice age to review it.
16. For some clients, call them directly and work through details on the phone. For others, use instant messaging. Email is useful in most cases but not as quick for smaller details. You can experiment with an e-collaboration site online, but you still have to get the client to take the time to answer questions on it.
17. See the article for TECHWR-L from a couple of years ago on this topic. <http://www.techwr-l.com/techwhirl/magazine/writing/effectivetechreviews.html>
18. There are also several more recent articles out there <http://www.techwr-l.com/techwhirl/htsearch/index.html>

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# Editorial Blithers

## What's In It For Me?

by Karen L. Zorn, Managing Editor

At the CMAC summer planning meeting, Dana Osborne led group discussions about several topics important to our chapter. One is increasing our membership. How do we go about that? Let's face it, talking with members at meetings is preaching to the choir. We aren't going to gain membership by talking up STC to existing membership.

So, who do you talk to? How about people you work with? Invite them to a meeting or networking. Talk to people you meet in other situations. I have several needleart buddies, one who is breaking into the field. You'll meet her at the August networking meeting.

Realistically, the bottom line for everyone is "What's in it for me?" although it is seldom asked. Think of what you've received from your STC membership. For me it's been jobs, interesting workshops and educational opportunities, stretching my personal potential, and the friendships I've made.

Ask yourself, "Why did you join STC, and why do you remain a member?" Your answers are the reasons you can give a potential member.

Bring a new person to the August Networking meeting!

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## Letters from Readers

Sometimes it's hard to believe that folks really read Rough Draft since there is very little feedback. Starting with this issue, we'll publish comments, kudos, and brickbats received from readers. Got a comment? Send it to: [rough\\_draft@zorntech.com](mailto:rough_draft@zorntech.com).

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Hello Gloria,

I just read your piece in Rough Draft, and wanted to let you know that I have been using OpenOffice for about a year. I do not use it on client projects at the moment, because I use AuthorIT, and it requires Microsoft Word to generate print documents. I have used OpenOffice extensively for creating catalogs (Writer) and managing inventories (Calc) for an online store, and they both performed admirably. There were no insurmountable obstacles to using OpenOffice on major projects.

Your article clearly states that your exploration of this tool was limited, but I do think you got the gist of it. It

does a great job, overall, but there are still a few glitches to be worked out. Quite honestly, if AuthorIT supported word processing applications other than Microsoft Word, I would switch to it OpenOffice in a second. Every application has its shortcomings, but I do believe OpenOffice is a worthy competitor for Microsoft's products. I currently use Mozilla Firefox for my browser, Mozilla Thunderbird for my e-mail application, and I'd love the opportunity to migrate away from Microsoft Office to an Open Source product.

Good job on the article!

With thanks,

Joe Ryan  
Technical Writer  
Hospitality Solutions International  
--a division of MICROS Systems, Inc.

July 17, 2006

# Help Wanted

Your STC Phoenix chapter needs volunteers in many areas. There are current opportunities as well as ones for the upcoming 2006-07 program year.

Why should you volunteer?

- You can practice or enhance existing skills or learn new ones.
- You'll meet new people and expand your network.
- You'll have fun!

We are currently seeking volunteers in the following areas:

- **Public Relations** manager: create a public relations plan for the Phoenix community, place notices of meetings and educational opportunities in local business publications and professional organizations
- **Volunteer Manager**: recruit volunteers for positions within the chapter, maintain list of volunteers
- **Publication, Art, and Online (PAO) Competition Liaison**, work with the Kachina chapter and our chapter judges

- **Program committee members**: help plan and organize programs for the upcoming year
- **Education committee members**: help plan and organize seminars and workshops for the upcoming year
- **Web committee members**: assist with the community web site
- **Newsletter contributors**: help keep our members informed with news regarding our profession, community and SIG activities

To volunteer or to get more information: contact Tim Eull or any one of the **Phoenix Community Contacts** members.

Have skills in an area not mentioned above?

Not sure of what you want to do or how you can help?

LET US KNOW! We'll find a place for you!